



**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, September 14, 2022**

Designated Federal Officer

- Matthew O’Sullivan Acting, TAP West Chief

Attendance

- Richard Bell Corpus Christi, TX Member
- Denise Besson Trufant, MI Member
- James “Jim” Buttonow Summerfield, NC Member
- Ruth Guyon Bellevue, NE Member
- Jared Lefevre Billings, MT 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
- Denise Besson Trufant, MI 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
- Michael Odom W&I Program Analyst

Quorum

A quorum was met.

Welcome and DFO Report



Matthew O'Sullivan, Acting TAP West Chief opened the meeting and welcomed everyone to the call. An overview of the agenda was provided and the following DFO Report:

- September 15, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting
- September 21, 2022, the Ad Hoc Committee for the TAP Chairs and ICC will meet at 2:30 PM, EDT.
- September 22, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting
- September 28, 2022, beginning at 12:00 PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting

National Office

Terrie English listened in on the call.

Chair Report

Leigh Ann Wood provided the following updates:

- Members were notified www.ImproveIRS.org has been going in and out
- Encouragement to members to enter their time on the Activity Reports

Minutes Approval

TCC Minutes for August 10, 2022, were approved with corrections.

Jim Buttonow made the motion and Richard Bell seconded

Issues assigned

Candace Smith shared the following:

Issue 54248, Maximizing Outreach for Benefits the purpose is to identify opportunities to provide additional Outreach to Taxpayers to make them more aware of refundable credits. This is geared towards low income, elderly and disabled. Subcommittee 1 completed the referral form and recommended moving forward for approval

Buttonow motioned to approve, and Richard seconded

Decision: Full Committee Consensus approved to forward to the Joint Committee

Buttonow shared the following:

Issue 54250, Increase IRS E-File Rate the purpose is to increase IRS E-File rate and the online account adoption. Seven recommendations were made: Improve the paper returns for processing, allow for prior year return E-Filing capability through EI supply software and there were five recommendations related to Online account adoptions: prior year capability for Taxpayer to register for online account when they file their return, use an authentic service provider to set up an IRS online account, having TAS send in online account invitation notices



instructions and have IRS send an invitation when Taxpayer access the online data retrieve when doing the financial aid form.

Joanne Thurston motioned to approve and Buttonow seconded

Decision: Full Committee Consensus approve Issue 54250 and forward to the Joint Committee

Issue 56584, Bar coding and paper returns, Subcommittee 2 recommendation is to close this issue. It is covered in the prior recommendation

Buttonow motioned to close, and Bell seconded

Decision: Full Committee Consensus to close Issue 56584

Buttonow and Smith volunteered to present to the Joint Committee. Holloway will send the information to them

Member of Public

N/A

Program Owner Report

Michael Odom stated there is one open referral #43684 and is due October 13, 2022. There are zero reconsiderations, zero implementations checks and one SME question on extended file demographics. This is a research project for 2018 to 2020 and he anticipates having the response back by October 3, 2022. The last referral, Gilbert Martinez was contacted and will work with him on the response

Subcommittees Report

Subcommittee 1

Candace Smith provided the following update for Subcommittee 1:

- **Issue 52167**, ID.ME Subcommittee 1 was asked to identify opportunities to address Taxpayers concerns with sharing and retention of personally identifiable information and biometric data by a third party. The subcommittee met on last week. They brainstormed ideas to address the concerns. They identified seven ideas to make the referral. 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. Members were encouraged to share ideas. Buttonow shared information on a CPE for Practitioners with discussions on ID.ME

Subcommittee 2

Jim Buttonow shared the following update:

- Issue 52736, Verifying Dependents prior to Returns acceptance. Subcommittee 2 has spent a lot of time researching and they are continuing research on this issue. They will have recommendations or recommend closing by next month.



Screening Committee

Buttonow shared the following updates:

- The Screening Committee did not meet on last month
- There were no issues screened and they anticipate having a report for next month
- The Screening Committee is caught up to date and had screened over four hundred issues with the possibility of two hundred new issue

Outreach

Victoria Ramirez shared the following updates:

- Members were encouraged to have their Activity Reports up to date by today for the Annual Report
- Encouragement to go into local communities and continue to talk with individuals for possible Outreach activities
- Members were asked to share any Outreach events or issues they may have had
- The question was asked where the committee was at on Outreach with the E-File messaging through social media and network. Ramirez responded they had talked about social media and their strategy on E-Filing messaging. Her concern was on how long things were taking to get through the process. It is her understanding it is getting posted this week. She will follow up on the posting. Members were encouraged to reach out if interested in becoming an administrator
- Members were encouraged to share any Outreach event or activity in the chat with the committee
- Bell stated he participated in an Outreach event a week ago. IRS came out with a Forgiveness and a grace period was going to be given if Practitioners could get it in by September 15, 2022, to October 31, 2022. Buttonow explained what Bell was referring to. He will share a copy of the notice in the chat to members on the failure to file penalty. Holloway added she did post the information for viewing

Internal Communications Committee (ICC)

Ramirez shared the following updates for ICC:

- ICC members are continuing work on Facebook strategy and getting E-Filing messaging up this week
- They are discussing Taxpayers Appreciation Day planning for early 2023

Action Items

Holloway shared the following Action items:

- Check www.TAPSpace.org to make sure the article has posted
- Forward TCC approved August 10, 2022, minutes to Kevin Brown for posting onto www.ImproveIRS.org



- Forward Issue 54248 to Gilbert Martinez to be added to the Joint Committee's Agenda
- Issue 54250, send to Martinez for the Joint Committee meeting
- Send Buttonow and Smith the invite for the Joint Committee's meeting
- Issue 54584, close out on the system
- Send an email message to the Screening Committee to schedule their next meeting. Requesting a response as soon as possible
- Make sure to complete all Activity Reports on www.TAPSpace.org
- Send out individual Activity records to members

Martha Lewis thanked members for their hard work. A reminder expressed if members are interested in joining the leadership team as a 2023 National Chair or Vice Chair, reach out with questions to Lillie or Lewis. Members you are appreciated.

Eugene Lillie reminded members of the email request from Gilbert Martinez asking for a quote for the Annual Report. Members were asked to respond to Martinez. The event is planned to be held in January. He is excited about the Outreach the members are doing and their efforts. He is always available to assist and answer questions.

Roundtable

Holloway asked for any comments from members:

- Buttonow congratulated the IRS for getting the Inflation Reduction Act completed. Communications needs to be timely in getting communications approved and to do timely Outreach. Getting responses timely for the Annual Report is the final suggestion
- Ramirez stated the committee will discuss the messaging on social media during next month's meeting
- Martinez added he did post the message on Setting the Record Straight by the Commissioner. Members are able to post articles on the Facebook page, but the Administrator would need to approve it
- Ruth Guyon stated she can assist with the administrator portion. Holloway will send Guyon a message with an invite for ICC meeting
- Wood thanked members for their participation and encouraged everyone to continue showing up at the meetings
- Joanne Thurston stated how excited she is from the work on the Penalty Release. She also asked where the minutes are posted on www.TAPSpace.org and Holloway responded they are there and also posted on www.ImproveIRS.org

O'Sullivan thanked everyone for attending the meeting.

Close



The meeting was officially closed at 12:50 PM, EDT.

**Next Meeting: Wednesday, October 12, 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.