



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 11, 2020**

**Designated Federal Officer**

- Cedric Jeans Designated Federal Officer

**Members Present**

- |                        |                 |            |
|------------------------|-----------------|------------|
| • Patricia Anthony     | Garland, TX     | Member     |
| • James “Jim” Buttonow | Summerfield, NC | Vice Chair |
| • Lindsey Funair       | Dubois, PA      | Chair      |
| • Matthew (Ryan) Groff | Beverly, MA     | Member     |
| • Leigh Ann Wood       | Columbia, SC    | Member     |
| • Marlon Bell          | Pearland, TX    | Member     |

**Members Absent**

- |                     |                |        |
|---------------------|----------------|--------|
| • Hercules Analitis | Urbana, IL     | Member |
| • Ai Lin            | China Lake, CA | Member |
| • Cedric Obiaka     | Omaha, NE      | Member |

**Staff**

- |                          |                           |
|--------------------------|---------------------------|
| • Debra “Debbie” Awalt   | Wage and Investment (W&I) |
| • Kevin Brown            | TAS CSO Secretary         |
| • Conchata Holloway      | TAP Program Analyst       |
| • Antonia “Toni” Keeling | TAP Program Analyst       |
| • Michael Odom           | W&I Program Analyst       |
| • Antoinette “Toni” Ross | TAP Program Analyst       |
| • Fred Smith             | TAP Program Analyst       |

**Roll Call**

Quorum was met.

**Public**

None

**Welcome Announcements/Acknowledgements**

Cedric Jeans welcomed everyone to the meeting and made two adjustments to the agenda; Jeans will report for Terrie English and Kevin Brown will be the secretary for this meeting.

**DFO Report/National Office Report**

Jeans reported that the annual tax forums are being done virtually and TAP has a virtual booth. Jeans encouraged the members to get the word out to build more



traffic. The Joint Committee (JC) annual planning meeting will be conducted on August 25-26, 2020, from 1:30 p.m. to 3:30 p.m.. Jeans asked members to submit any suggestions for projects for next year to the committee leadership. Monday, August 17, 2020, at 1:00 p.m. there will be a virtual all TAP meeting. Maryclaire Ramsey will review the Tax Roadmap. Jeans encouraged the committee to think about this committee's part of the TAP Annual Report which is being put together now. Jeans solicited support from the committee for this project.

### **Chair Comments**

Funair welcomed all and requested members mute their phones until they start speaking.

### **Approval of Minutes**

July 14, 2020, Meeting Minutes. Buttonow motioned: Funair seconded.

**Action:** minutes approved as submitted.

### **Approval of Issues**

- Issue 40613 Understanding Taxpayer Representation

Publication 4019. Committee agreed to approve prior to Buttonow completing the rebuttal write up. The proposal will be on [www.irs.gov](http://www.irs.gov) under the third-party authorizations section to include a copy of publication 4019 and link to the chart inside the publication. Funair motioned; Groff seconded

**Action:** Rebuttal approved to be elevated to the IRS for consideration.

### **Outreach Report**

Holloway reported receiving three activity reports for July. Buttonow reminded members to send these reports to Buttonow, Holloway and to: [taxpayeradvocacypanel@irs.gov](mailto:taxpayeradvocacypanel@irs.gov). Buttonow spoke of a byline message to be sent to media contacts for outreach. They will send this out to the media in North Carolina and report back next month about the results.

Jeans and Buttonow reported working with Robert "Bob" Moretti, the TAP Vice-Chair, on this letter for the beginning of the year and the end of the year. Jeans reported also working on a congressional newsletter. Funair reminded the committee that some states have multiple representatives and we should send the letter to them all.

### **Subcommittee 1 Report out**

- Issue 37272 IRS Communication for Military Personnel

Funair proposed adding this topic as a subset to the Online Account issue and to send a letter of thanks to the IRS and thank them since they may have addressed this already. Buttonow laid out how much progress the IRS has made on this project and urged the need to send a thank you. Holloway indicated



Publication 525 and Publication 3 have links to one each other on the website. Holloway and Buttonow will write this up. Funair motioned: Buttonow seconded.  
**Action:** Issue elevated to IRS as discussed.

- Issue 40485 Tax Calendar

Anthony had no update but will submit a proposal for review later this week.

- Issue 36435 Online Penalty Relief Request

Buttonow will send questions to Funair and this will be tabled for the next subcommittee meeting.

Funair proposed merging both subcommittee meetings before the call ends.

### **Approval of Issues:**

Issue 40613 Understanding Taxpayer Representation

### **Subcommittee 2 Report Out**

- Issue 43331 Improveirs.org link on IRS.gov

Buttonow wants to work more with Subject Matter Expert (SME) Benjamin Hodges on this issue. Buttonow asked members to send questions to Holloway for the SME to be ready for the next meeting.

- Issue 40148 Multiple Year Display for IRS WMR Tool

Issue tabled until next meeting. Committee will work with Awalt about accessing prior year refunds and reviewing transcripts.

- Issue 41883 Tax Lien Payoff

Transcript payoff proposed for this issue. Jeans suggested putting this in formal referral format and presented at the next meeting.

- Issue 41900 Accelerate Online Accounts for Taxpayers

Still be worked.

- Issue 41768 Accelerate Online Accounts for Professionals

Still being worked

Funair proposed merging both subcommittee meetings into one working meeting on the first Monday of each month. Funair motioned; Groff seconded

### **Internal Communications Committee**

Funair encouraged members to read last year's annual report in preparation for this year's report.

### **Action Items Summary**

- Get your activity reports in by the twenty-fifth of each month
- July minutes sent for posting



- Issue 40613 will be worked with Buttonow
- 37272 updated and worked by Buttonow
- 43331 questions to see if SME is needed
- First Monday at 12 p.m. ET subcommittee/working committee meeting

### **Closing**

Funair thanked everyone for joining the call. Jeans reminded the committee about the all TAP virtual meeting on Monday August 17, 2020, 1 p.m. ET then closed the meeting.

**The next monthly meeting for the Taxpayer Communications Committee will be on September 8, 2020, from 12:00 -1:00 p.m. EST.**

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