



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 14, 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     |

**Members Absent**

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

**Staff**

- |                        |                           |
|------------------------|---------------------------|
| • Debra (Debbie) Awalt | Wage and Investment (W&I) |
| • April Benson         | TAS CSO Secretary         |
| • Tamikio Bohler       | W&I Program Analyst       |
| • Terrie English       | TAP Director              |
| • Conchata Holloway    | TAP Program Analyst       |
| • Gilbert Martinez     | TAP Program Analyst       |
| • Michael Odom         | W&I Program Analyst       |
| • Fred Smith           | TAP Program Analyst       |

**Roll Call**

There were no public members on the call.

**Quorum**

Quorum was initially met for this meeting but not maintained for the entire call.

**Welcome Announcements/Acknowledgements**

Cedric Jeans welcomed all and declared the meeting opened; he then turned it over to the Chair, Lindsey Funair.

**Chair Comments**

Funair welcomed all and reviewed the agenda.



### **National Office Report**

Terrie English gave a reminder about July 2-August 20 for the virtual TAP chat room Q&A with the public. If you are interested in volunteering, please contact Fred Smith, the outreach analyst. The Taxpayer First Act meeting is this week, July 16-17. We are asking for your input for a focus group for the next Joint Committee meeting on July 23, 2020.

### **DFO Report**

Jeans shared that new articles are available on [www.tapSPACE.org](http://www.tapSPACE.org) and moved on to a vote for minutes approval.

### **Minutes Approval**

Request for any further changes before a vote on the draft minutes from the April, May, and June meetings. No changes suggested. Jim Buttonow made a motion to approve, Ryan Groff seconded the motion, a vote was called, all were in favor, the motion was passed, and the minutes for April, May, and June meetings were approved.

### **Approval Response**

**Issue 40224: Provide TAP Link on [www.irs.gov](http://www.irs.gov)** - Ben Hodges (TAS CSO M&T) on a previous call, had given some great recommendations for this issue and links were suggested to be added. Funair recommended closure. Issue 40224 was closed. The committee will open a new issue for the TAP keywords (Issue 43331)

Debbie Awalt mentioned that IRS.gov intention is to eventually translate into different languages like simplified Chinese, Spanish, Korean, Russian, etc.

**Issue 42087: IRS Free File Program** - Jeans stated that we are free to close this issue. Issue 42087 was closed.

**Issue 40613: Understanding Taxpayer Representation (Forms 2848 and 8821)** - Buttonow brought up the Form 2848 legacy issue and suggested a link to [Pub 4019](#) chart regarding differences of the authorizations. Ben Hodges (TAS CSO M&T) had also previously suggested to Buttonow that we should include a link to that publication, as the chart on page 2 is the tax practitioners go-to chart. Jeans agreed with suggestion to add a link and that we run it by the subcommittee and send a rebuttal response over to the IRS. Funair suggested we keep this open and on the agenda for the meeting next month. Issue 40613 remains open and will be on the agenda for the August meeting.

### **Outreach Report**

Buttonow strongly reminded everyone that committee reports are due by the 25<sup>th</sup> of every month and indicated that the committees really need to make more of an



effort to get outreach reports turned in by the committees on time. He also suggested that we need more members to commit to meetings to get these important issues moving. A discussion was held about the lack of members available for meetings to meet quorum and pass motions. Funfair also reiterated this point and encouraged everyone to focus on getting involved in meetings and getting committee reports in timely so they can be reported up the chain. Martinez will be sharing information on outreach toolkit results with all TAP members.

### **Subcommittee 1**

**Issue 37272: IRS Communication for Military Personnel** - Hercules Iraklis sent referral on Communication for Military Personnel. Funair referred to page 16 of [Pub 525 Taxable and Nontaxable Income \(Rev. 02-2020\)](#) for information on military guidance. Buttonow suggested that Table 1 on page 7 of [Pub 3 Armed Forces' Tax Guide](#) is more detailed. He suggested the publications committee should take a look at this issue, rather than communications. Jeans reiterated that the biggest issue was military folks having access and easily finding or navigating information online. Funair suggested a FAQ link for military members. Buttonow stated the IRS has updated the military section of IRS.gov recently. The new content is fairly easy to locate with google and doesn't see any issue with the site or finding military information. This issue will be reviewed by the Subcommittee 1 and possibly closed after additional research.

Alton Berger from C&L stated that this page HAS been updated by IRS and is much easier to navigate. The commissioner is prior military, so he was brought in to make sure that the information is current and accessible. Funair suggested we send back a kudos to the IRS for the improvement, and Jeans stated that the committee would like to recognize the IRS on their improvement and close this issue. Motion to close Issue 37272 was filed and seconded, but Groff left the call and the committee lost quorum.

Due to loss of quorum, Issue 37272 was tabled for the next meeting.

**Issue 40485: Tax Calendar-** Anthony stated that she is receiving guidance didn't see the concern that was expressed. She will have more information on our next meeting. Funair stated that once we get into individual accounts, the value is customization and taxpayer reminder notifications via the online account would be a more useful recommendation (in the long term). She suggested Issue 40485 be tabled for the next meeting. The committee commended Patricia on the efforts in this area.

### **Subcommittee 2**

**Issue 43331: TAP Link on IRS.gov** - Buttonow- focusing on the keyword aspect that would direct certain searches to improve irs.org. Hodges has been very



helpful on this issue. Funair states that issue 43331 is really related to Issue 40224 and we need to just work on keywords. Conchata Holloway indicated that Hodges did just send out an email on keywords.

**Issue 40148: Multiple Year Display for IRS Where's My Refund (WMR) Tool**

Buttonow feels this is really a sit up moment for us. There are 5.2 million prior year returns filed that contain unclaimed refunds (that is 3% of returns filed each year). Taxpayers will be able to use this tool to view information on prior year refunds and finally claim those refunds.

**Issue 41883: Tax Lien Payoff** – Buttonow states that attorneys can't get payoff amounts sent to them easily and the "View My Account" does not give attorneys access to those payoff amounts. We've asked for experts to respond and make recommendations before we can respond.

Gilbert Martinez is seeking responses to questions and stated he will send that out today.

**Issue 41900: Accelerate Online Accounts for Taxpayers & Issue 41768: Accelerate Online Accounts for Professionals**

Buttonow states that Issues 41900 & 41768 are still in development and adoption. The timelines have been well-documented and examined by TAP, IRS, and consultants, but we are seeing a lot of comments from public that they need access to their accounts. We should promote the account a little more and promote what it can do. Some people can't read their transcripts, but as that improves, taxpayer satisfaction will improve. Buttonow asks "Do we want to take on this issue?" Priority focus and solution for most of our issues is an online account to improve transparency and increase ease of online access.

Martinez states that he has follow-up to questions he has emailed and has invited SME to the next Subcommittee 2 meeting. He will send that information out to the Subcommittee 2 members.

**Internal Communications Committee**

Funair reviewed that they have a Facebook page for sharing outreach content if you want to share LinkedIn, Facebook, or Instagram so others can benefit from your best practices. Make sure to share TAP's Facebook page when you can. For committee meetings, we are really having low membership participation. We do have two merging subcommittees, but we lost our quorum for today. How do we encourage better participation?

Jeans suggested maybe sending send an email with dates and times and get everyone to respond to you in advance. Make that information known in a public setting. Buttonow suggested a meeting invite to be sure we get a quorum in the



future, Funfair asked that we please send out encouraging emails to ask for participation.

### **Screening Committee**

Buttonow stated that we had 52 issues to start and now only 2 issues, but we are still working on 43331 action item – we should take that up with the online account issue.

### **Action Items Summary**

- Get your activity reports in by the 25<sup>th</sup> of each month
- Issue 40613 remains open and will be on the agenda for the August meeting.
- Issue 37272 has been tabled to possibly close next meeting.
- Holloway said she will share Screening Report with Buttonow and will send out

### **Closing**

Jeans announced that the meeting was adjourned for the month of July and thanked everyone for their time.

**The next monthly meeting for the Taxpayer Communications Committee will be on August 11, 2020, at 12:00-1:00 p.m. ET.**

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