



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 9, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|------------------------|-----------------|------------|
| • James Buttonow (Jim) | Summerville, NC | Vice Chair |
| • Lindsey Funair | Dubois, PA | Chair |
| • Ai Lin | China Lake, CA | Member |

Members Absent

- | | | |
|------------------------|-----------------|--------|
| • Patricia Anthony | Garland, TX | Member |
| • Jordan Bayles | Terre-Haute, IN | Member |
| • Marlon Bell | Pearland, TX | Member |
| • Hodari Brown | Red Wood, MI | Member |
| • Matthew Groff (Ryan) | Beverly, MA | Member |
| • Hercules Iraklis | Urban, IL | Member |
| • Cedric Obiaka | Omaha, NE | Member |
| • Leigh Ann Wood | Columbia, SC | Member |

Staff

- | | |
|--------------------------|---------------------------|
| • Debra Awalt | Wage and Investment (W&I) |
| • Kevin Brown | Management Assistant |
| • Tamikio Bohler | W&I Program Analyst |
| • Terrie English | TAP Director |
| • Conchata Holloway | Program Analyst |
| • Gilbert Martinez | TAP Program Analyst |
| • Michael Odom | W&I Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |

Roll Call

There were no public members on the call.

Quorum

Quorum was not met for this meeting.

Welcome Announcements/Acknowledgements

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

Chair Comments



Funair welcomed all and reviewed the agenda. Funair said her focus was on the TAP Facebook page, ensuring that members were thoroughly completing their outreach reports and getting volunteers for the July newsletter. There was a brief discussion regarding penalty relief being a big issue in the future.

National Office Report

English indicated that information about penalty relief is available on www.irs.gov, and encouraged members to review any IRS updates. The virtual all TAP meeting will be on June 18²⁰, the National Taxpayer Advocate will be attending. The next Joint Committee meeting will be on June 25, 2020.

DFO Report

Jeans shared the following:

- Babb has been replaced by Kevin Brown.
- Outreach requests and administrative work will be completed by Brown.
- There are new TAP articles posted to www.tapspace.org
- This year's Tax Forums will be conducted virtually.
- There are new Filing options available on www.tapspace.org.

Minutes Approval

The draft minutes from the April and May will be tabled until next month.

Project Committee work status

Buttonow agreed with some of the IRS responses but ultimately, the partially adopted and not adopted responses will have to be tabled until next month. Funair would also like to review the rejected referral. There was a discussion regarding not having a "contact us" for certain improvements. Jeans and English will get Subject Matter Experts SMEs to continue this discussion. Buttonow will send information to the committee to be reviewed before the next meeting. Funair requested clarification on the intent and purpose for input by the taxpayer.

Issue 40613: Understanding Taxpayer Representation via the use of Forms 2848 and 8821

Issue 40224: Provide TAP Link on IRS.gov Website

Issue 42334: Taxpayer Communication and Online Tool to address CARES Act Stimulus Payments- this issue was accepted by the IRS and has been adopted. The committee voted to accept the IRS response.

Issue 42087: IRS Free File Program- The committee voted to close this issue. The IRS has agreed to send talking points to the committee. The talking points can be used at outreach events. Awalt will organize those talking points from the IRS and share with Gilbert who will then share with the full committee.

Subcommittee 1



Issue 40485: IRS Tax Calendar- This subcommittee is still conducting research to determine if this issue needs to be worked up as a referral.

Issue 37272:

Jim Buttonow sent a report to the committee, via email, that addressed this issue. Martinez reported that Kusiak worked on this publication few years ago. This was also part of the Most Serious Problems (MSPs) in the past. Martinez will send the 2017 MSP # 17 for the committee for review. Holloway will send the Treasury Inspector General for Tax Administration (TIGTA) report about military aid. Jeans and the staff reported that past member Sheila Olsen, retired Oklahoma, was part of this.

Buttonow reported that Hercules Iraklis is drafting a referral on Communication for Military Personnel to submit to the IRS. There will be a discussion on this issue at the next subcommittee meeting and a full report will be given at the next full committee meeting in June.

Subcommittee 2

Accessing IRS is still being worked and may become an issue if it needs to, according to Funair.

Issue 40148: Multiple Year Display for IRS Where's My Refund (WMR) Tool- this issue is being researched by the subcommittee. Being worked
Awalt hopes to have a response by next week. The tax lien issue is still being worked at this time, according to Awalt.

Issue 41768: Accelerate Online Accounts for Tax Professionals- Some preliminary research is being done by the committee to determine if this issue should be developed.

Outreach

The Outreach toolkit still being worked by committee. Martinez will share this information with all TAP members soon. Buttonow indicated that we need to make an effort to get outreach reports turned in by the committee. English reported that the business cards has been put on hold until the Washington D.C. office reopens. Once that happens, they will be mailed out to panel members.

Buttonow expects Paycheck Protection Program (PPP) issues coming during the summer since all the rules continue to evolve. Funair mentioned the rules continue to change. This will most likely affect the IRS as these loan repayments.

Screening

Issue 36435 remains from 3 years ago.

Action Items



- Cedric Jeans and Conchata Holloway web designer to join the call.
- Martinez will conduct additional research for military issue.
- Martinez and Holloway suggested information for free file.
- Martinez and Holloway will reach out to members for activity reports.

Closing

Jeans thanked the members for their time and participation and Jeans declared the meeting closed.

The next monthly teleconference for the Taxpayer Communications Committee will be on July 14, 2020 @ 12:00 -1:00 p.m. ET.

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