



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 26, 2020  
Virtual Annual Meeting – Day 1**

**Designated Federal Officer**

- Cedric Jeans                      Designated Federal Officer

**Members Present**

- |                        |                 |            |
|------------------------|-----------------|------------|
| • Jordan Bayles        | Terre-Haute, IN | Member     |
| • Marlon Bell          | Pearland, TX    | Member     |
| • Hodari Brown         | Red Wood, MI    | Vice Chair |
| • James Buttonow (Jim) | Summerville, NC | Member     |
| • Lindsey Funair       | Dubois, PA      | Member     |
| • Matthew Groff (Ryan) | Beverly, MA     | Member     |
| • Hercules Iraklis     | Urban, IL       | Member     |
| • Cedric Obiaka        | Omaha, NE       | Member     |
| • Leigh Ann Wood       | Columbia, SC    | Member     |

**Members Absent**

- |                    |                |        |
|--------------------|----------------|--------|
| • Patricia Anthony | Garland, TX    | Member |
| • Ai Lin           | China Lake, CA | Member |

**TAP Staff**

- Gilbert Martinez, TAP Program Analyst
- Rose Babb, Management Assistant

**Roll Call**

There were no public members on the call.

**Quorum**

Quorum was met for this meeting.

**DFO Welcome and Comments**

Cedric Jeans welcomed everyone to the meeting. This is the first official meeting for the Taxpayer Communications Project Committee for TAP year 2020. Jeans reviewed the agenda. Introductions of staff and members followed the announcements. Jeans covered the TAP Mission – PowerPoint presentation.

**TAP Member Procedures – Martinez**

Ground rules were shared with members. Some of the rules discussed members to be respectful, make specific suggestions; share information; all member



participation; attack problems not people; okay to disagree; build a solid team; no sidebar conversations; one person at a time; put phones on mute when not talking; reach an agreement; consensus; meeting minutes and minutes approval process; establish meeting quorum; telephone and email etiquette; timeframes should be in the subject line; review and be prepared for meetings by referring to TAP Space for required pre-reads; turn in Activities Reports on time; a lot of communicating by email and some by phone; tools: WebEx & TAP Space; on calls please state your name when talking; please notate when emails need urgent attention in subject line and/or call us; attending calls is very important – notify the TAP Staff when you cannot attend a call and/or meeting;

### **Chair Nomination Presentation**

Martinez and Jeans presented information about the chair and vice-chair election process for the Taxpayer Communications Committee as well as subcommittee leads. Chair elections followed the presentation. Linsey Funair was elected as Chair and James Buttonow was elected as the Vice Chair.

### **End of Day/Announcements**

Jeans and Martinez adjourned the meeting until Friday, March 27 for the second and final session of the Virtual Annual Meeting.



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 26, 2020  
Virtual Annual Meeting – Day 2**

**Designated Federal Officer**

- Cedric Jeans                      Designated Federal Officer

**Members Present**

- |                        |                 |            |
|------------------------|-----------------|------------|
| • Patricia Anthony     | Garland, TX     | Member     |
| • Jordan Bayles        | Terre-Haute, IN | Member     |
| • Marlon Bell          | Pearland, TX    | Member     |
| • Hodari Brown         | Red Wood, MI    | Vice Chair |
| • James Buttonow (Jim) | Summerville, NC | Member     |
| • Lindsey Funair       | Dubois, PA      | Member     |
| • Matthew Groff (Ryan) | Beverly, MA     | Member     |
| • Hercules Iraklis     | Urban, IL       | Member     |
| • Cedric Obiaka        | Omaha, NE       | Member     |
| • Leigh Ann Wood       | Columbia, SC    | Member     |

**Members Absent**

- |          |                |        |
|----------|----------------|--------|
| • Ai Lin | China Lake, CA | Member |
|----------|----------------|--------|

**TAP Staff**

- Gilbert Martinez, TAP Program Analyst
- Rose Babb, Management Assistant

**DFO Welcome announcements**

Cedric Jeans welcomed the members back to the 2<sup>nd</sup> day of the Virtual Annual Meeting. Prior to turning the meeting over to the elected Chair Linsey Funair, Jeans made the following announcements:

- The New National Taxpayer Advocate (NTA) Erin Collins will start as the new NTA beginning Monday, March 30.
- Due to COVID-19, the tax returns and extensions deadline has been moved from April 15 to July 15, 2020.
- Tax recruitment season ends March 30; members were asked to share the information to enable the public to apply in those states where recruitment is low.

**Roll Call**

There were no public members on the call.

**Quorum**



Quorum was met for this meeting.

### **Minutes Approval**

Funair asked the member to vote on the minutes for November 2019. There was a consensus to approve the minutes. The minutes will be posted to Improveirs.org for the public to view.

### **Meeting Dates and Times**

**Full Committee Schedule** – 2nd Tuesday of each month from **12:00 – 1:00p.m. ET.**

**Subcommittee 1 - Meeting Schedule** – 1st Monday of each month from **12:00 – 1:00p.m. ET.**

#### **Members:**

Patricia Anthony  
Hodari Brown  
Linsey Funair (Chair)  
Hercules Iraklis  
Cedric Obiaka

**Subcommittee 2 - Meeting Schedule** – 1<sup>st</sup> Tuesday of each month from **12:00 – 1:00p.m. ET.**

#### **Members:**

Jordan Bayles  
Marion Bell  
Jim Buttonow (Vice Chair)  
Ryan Groff  
Leigh Ann Wood

### **Quality (QR)**

**Members:** Groff and Wood

**Internal Communications Meeting:** To be determined.

**Members:** Bell and Funair

**Outreach:** Buttonow

**Screening Committees Members**(Scheduled on Ad Hoc basis): Bayles, Buttonow, and Obiaka

Martinez provided a quick overview on the process of preparing IRS Proposals, Referral and Responses.

### **Review of IRS Responses**

Funair reviewed the following issue with the full committee:



- Issue 41392 - Tax Professional Online Account & Taxpayer Online- the Committee gave a motion to accept the IRS responses.

### **Project Committee**

Subcommittees were formed to work the following issues:

#### **Subcommittee 1**

- **Issue 39724:** IRS Free File Program
- **Issue 40485:** IRS Tax
- **Issue 37272:** Communication for Military Personnel

#### **Subcommittee 2**

- **Issue 40148:** Where's My Refund Site
- **Issue 40148:** Where's My Refund not provide other year
- **Issue 40224:** Provide TAP Link on IRS.gov Website

Jeans encouraged the members to use as many research resources as they can including IRS.GOV. He also encouraged returning members to become mentors to the new members. Returning members can review the rosters on TAP Space and contact Analyst Martinez for more information.

Buttonow mentioned the current status on the COVID-19 and its effects on the taxpayers. He reiterated Commissioner Rettig's message to the IRS. There will be complex issues that will need to be addressed as the Stimulus package unfolds. The People First Initiative along with Stakeholders will play an integral part in assisting taxpayers. Buttonow also stated that the TAP must also be the voice to assist in answering some of those complicated questions from the public.

### **Action Items**

- Members are encouraged to conduct outreach virtually due to COVID-19. If members would like to make visual presentations, Jeans asked them to reach out to both him and Analyst Martinez for assistance. This can be done Monday through Friday during business hours.
- Marketing materials distribution will continue to be mailed to members by request after the COVID-19 restrictions from in office to telework is lifted.
- New and returning members should submit their requests for business cards and their preferences on the cards via email within the next 7 days.
- Feel free to reach out to Analyst Martinez with any questions; he may field them to Subject Matter Experts for responses.

### **Closing**

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



**The first monthly teleconference for the Taxpayer Communications Committee will be on April 14, 2020 at 11:00 a.m. ET.**

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