



**Taxpayer Communications  
Project Committee Meeting  
Monthly Meeting Minutes  
November 10, 2020**

**Designated Federal Officer (DFO)**

- Terrie English                      Designated Federal Officer

**Member Attendance**

- |                        |                 |          |            |
|------------------------|-----------------|----------|------------|
| • Patricia Anthony     | Garland, TX     | (Absent) | 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     |
| • Hercules Analitis    | Urbana, IL      | (Absent) | Member     |
| • Marlon Bell          | Pearland, TX    | (Absent) | Member     |
| • Ai Lin               | China Lake, CA  |          | Member     |
| • Phillip Kleiber      | National Chair  |          |            |

**Staff**

- |                          |                           |
|--------------------------|---------------------------|
| • Kevin Brown            | TAP Secretary             |
| • Conchata Holloway      | TAP Program Analyst       |
| • Antoinette “Toni” Ross | TAP Program Analyst       |
| • Steven Thompson        | CSO                       |
| • Debra “Debbie” Awalt   | Wage and Investment (W&I) |
| • Dale Hawkins           | W&I Program Analyst       |
| • Michael Odom           | W&I Program Analyst       |
| • David Thompson         | CSO                       |

**Roll Call**

Quorum was not met.

**Public**

None

**Welcome Announcements/Acknowledgements**

Jeans opened the meeting at 12:00pm ET. Funair thanked everyone for joining the call. Kleiber thanked the committee for all it has done this year. Funair recognized Buttonow running for National Chair for next year. Funair thanked Jeans, Holloway and English for all their assistance this year.

**DFO Report/National Office Report**

English thanked everyone for this year and noted how different experiences,

personalities and skills help to appreciate this committee. English reminded the committee of the retirement ceremony November 20, 2020 and encouraged members to join. English admired Buttonow for joining because it takes a lot of courage to put yourself out there accepting a leadership position in TAP.

Jeans thanked the committee for all the hard work this year to include the video about the CARES act along with many other accomplishments this year. Jeans thanked veterans and recognized Veteran's day tomorrow. He also encouraged members to complete the end of year survey. Jeans asked members to submit their activity reports and reminded returning member they can still do outreach before the next TAP year officially begins. Jeans thanked the IRS for working very hard with us in this partnership.

### **Chair Comments**

N/A

### **Approval of Minutes**

October 13, 2020, Leigh Ann Wood changed to present. Buttonow motioned, Woods seconded.

**Action:** minutes approved as amended.

### **Outreach/Internal Communications Report**

Buttonow thanked Funair for her leadership and thanked the committee for all of their effort during this challenging year. Activity Report Submission by November 25, 2020. Buttonow encouraged members to read the newsletter to learn what is going on in other committees. Buttonow and Holloway continue to work on getting media outlet templates to help members get more outreach opportunities.

### **Subcommittee Report out**

- Issue 41900 Accelerate Online Accounts for Taxpayers
- Issue 41768 Accelerate Online Accounts for Professionals

Buttonow reported how online accounts and many other issues that could be quickly and easily resolved with online accounts. Kleiber suggested highlighting taxpayer wait time complaints. Buttonow recommended showing the impact of taxpayer's time as part of our reporting. Awalt indicated that these complaints are being looked at by IRS on several different levels to include the National Taxpayer Advocates (NTA) Most Serious Problems (MSP). Funair suggested members share any ideas for issues for next year. Buttonow spoke of a strategic approach for these issues helping the NTA to be able to push for the IRS to move forward on online accounts.

- Issue 36435 Penalty Relief- No update yet.

Buttonow spoke of how it is important to make taxpayers aware of their penalty relief options since many taxpayers are not aware of this. It is important for us to continue to push this information being made available to taxpayers to help improve their experience. This issue will continue to be worked next year.

Preview of Potential Issues for 2021:

- Issue 42909 Improving IRS Technology
- Issue 43804 Communicating with IRS via Email for Hearing Impaired
- Issue 43806 TDC Online Account
- Issue 42954 & 42958 Injured Spouse Claim via Online Account
- Issue 42966 Change of Address via Online Services

#### **Chair and/or Vice Chair Closing Comment**

N/A

#### **Action Items Summary**

- Send minutes to be posted.
- Members should submit activity reports by November 25, 2020.
- 41900 to be resent by Holloway for member recommendations.
- Holloway will follow up with MSP analyst and invite them to the next meeting.
- Follow-up with media relations about TAP member news release.

#### **Closing**

Funair thanked everyone for their efforts. Jeans thanked everyone for all their hard work the closed the meeting at 1:02pm ET.

**The next monthly meeting TBD.**

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



**Taxpayer Communications  
Project Committee Meeting  
Monthly Meeting Minutes  
October 13, 2020**

**Designated Federal Officer (DFO)**

- Terrie English                      Designated Federal Officer

**Member Attendance**

- |                        |                                    |            |
|------------------------|------------------------------------|------------|
| • 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     |
| • Hercules Analitis    | Urbana, IL                         | Member     |
| • Marlon Bell          | Pearland, TX              (Absent) | Member     |
| • Ai Lin               | China Lake, CA        (Absent)     | 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       |
| • Alton “Al” Burger      | Public Affairs Supervisor |
| • Mioshi Banks           | TAS Program Specialist    |

**Roll Call**

Quorum was met.

**Public**

None

**Welcome Announcements/Acknowledgements**

Holloway opened the call and welcomed all who joined. English will be the DFO and Buttonow will chair today’s call. The committee congratulated Groff on taking the BAR exam.

**DFO Report/National Office Report**

English reported that the extension filing date is October 15, 2020. Taxpayers experiencing homeless may qualify for Economic Impact Payments (EIP) and should register by November 21, 2020. This information is available on



www.irs.gov. The Commissioner and the National Taxpayer Advocate (NTA) testified on Capitol Hill on October 7, 2020, English encouraged members to view this online. English reported that the Business toolkit link was sent out last week for review.

### **Chair Comments**

N/A

### **Approval of Minutes**

September 8, 2020, Meeting Minutes. Buttonow motioned, Funair seconded.

**Action:** minutes approved as submitted.

### **Subcommittee 1 Report out**

#### **Approval of Issues**

- Issue 40613 Understanding Taxpayer Representative 2848 & 8821

This project recommends adding a link to Publication 4019 and to provide a chart on page two on the webpage. Buttonow motioned; Groff seconded.

**Action:** Issue elevated to Joint Committee (JC)

### **Members Approve TCC Summary of TAP Annual Report Date**

Buttonow summarized some of the committee's annual report to include the Free File program which resulted in a 51 percent increase in usage from the prior year. Buttonow spoke of the stimulus payment recommendations like the online tool and recommendations for "Where's my refund?" projects. There were also recommendations to benefit military personnel; there was visibility for the www.improveirs.org site.

There was a recommendation to help taxpayers get their balances from the IRS. Next year the online service accounts will be a major issue for this committee. Awalt asked that the committee continue to promote the Free File next year.

### **Outreach Report**

Buttonow encouraged members to submit any missing activity reports. Holloway is available if anyone needs help with their activity reports. Buttonow spoke about how members are doing outreach such as public outings and events with tax professionals. We are still working on the newspaper template for media contacts with Holloway. Jeans will follow up with Buttonow directly about this project.

Patricia Anthony will head the election program this year. They will send information soon.

### **Subcommittee: Report Out**

- Issue 41900 Accelerate Online Accounts for Taxpayers
- Issue 41768 Accelerate Online Accounts for Professionals

Both issues are still being worked.

- Issue 36435 Penalty Relief

This issue is still being worked with Subject Matter Experts.

### **Internal Communications Committee**

- TAP Newsletter was released October 5, 2020
- Next Newsletter Article is due October 25, 2020

Buttonow asked members to send any information for the newsletters to him and Holloway. Groff will work on the November newsletter.

### **Action Items Summary**

- Buttonow, Wood, Anthony and Analitis to respond by October 31, 2020 regarding issues related to online accounts.
- Additional information is forthcoming about running for Chair or Vice Chair.
- Mentorship meeting on October 21, 2020 at 3pm ET.
- Get activity reports to Holloway and Buttonow by October 26, 2020.
- Forward issue 40613 to Joint Committee.
- Post September minutes.

### **Closing**

Buttonow encourage members to read the annual report. English thanked the committee for all they did this year and closed the meeting.

**The next monthly meeting for the Taxpayer Communications Committee  
will be on November 10, 2020, at 12:00 - 1:00 PM EST.**

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



**Taxpayer Communications  
Project Committee Meeting  
Monthly Meeting Minutes  
September 8, 2020**

**Designated Federal Officer**

- Cedric Jeans Designated Federal Officer

**Member Attendance**

- |                        |                      |            |
|------------------------|----------------------|------------|
| • Patricia Anthony     | Garland, TX          | Member     |
| • James “Jim” Buttonow | Summerfield, NC      | Vice Chair |
| • Lindsey Funair       | Dubois, PA           | Chair      |
| • Matthew (Ryan) Groff | Beverly, MA (Absent) | Member     |
| • Leigh Ann Wood       | Columbia, SC         | Member     |
| • Hercules Analitis    | Urbana, IL           | Member     |
| • Marlon Bell          | Pearland, TX         | Member     |
| • Ai Lin               | China Lake, CA       | Member     |
| • Cedric Obiaka        | Omaha, NE (Absent)   | 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**

Jeans opened the call and welcomed all who joined. Jeans reported that he will be speaking for Terrie English who is out today.

**Approval of Minutes**

August 11, 2020, Meeting Minutes. Ryan Groff’s last name was corrected in the roll call section. Buttonow motioned: Funair seconded.

**Action:** minutes approved as amended.

## **Subcommittee 1 Report out**

### **Approval of Issues**

- Issue 41883 Tax Lien Payoffs

Funair motioned; Buttonow seconded. Approved

**Action: Issue elevated to Joint Committee (JC)**

Issue 40148 Multiple Year Display Where's My Refund (WMR) Tool

Funair motioned; Buttonow seconded. Approved

**Action: Issue elevated to (JC)**

- Issue 40485 Tax Calendar

Anthony motioned; Buttonow seconded

**Action: Issue elevated to (JC)**

### **DFO Report/National Office Report**

Jeans reported limited budget information to report with restrictions made by the pandemic. Jeans is currently updating the Federal Advisory Committee Act (FACA) database. This includes program information such as recommendations, finances for the program and meeting information for TAP.

TAP will be working with W&I and Small Business Self Employed for new projects next year. We are also accepting any new project ideas from the committee as well. Jeans said that in preparation for the new member orientation we are looking for committee members to help with this process to improve these presentations. Let Holloway know if you want to help.

Jeans reminded the committee that the TAP National Chair and Vice-Chair elections are coming up for next year's leadership. Volunteer if you want this position. Jeans reminded the committee to reflect on the upcoming September 11, 2001 day of remembrance coming up Friday

### **Chair Comments**

N/A

### **Approval of Issues**

- Issue 43331 Improveirs.org link on IRS.gov

Buttonow motioned, Anthony seconded.

**Action: Issue Dropped**

### **Subcommittee 1 & 2 Updates**

- Issue 37272 IRS Communication for Military Personnel-already elevated to IRS.
- Issue 40613 Understanding Taxpayer Representative 2848 & 8821
- Issue 36435 Penalty Relief- Awaiting IRS response



### **Subcommittee 1 & 2 Report Out**

- Issue 41900 Accelerate Online Accounts for Taxpayers
- Issue 41768 Accelerate Online Accounts for Professionals

Buttonow reported that the National Taxpayer Advocate wrote a blog about this issue which is why we should focus on any additional feature sets; how do we accelerate the development and how do we accelerate the adoption for this issue. Buttonow said there was a Treasury Inspector General for Tax Administration (TIGTA) that indicated the budget was part of the issue.

This is being looked at as a Most Serious Problem (MSP) by the NTA according to Awalt. Buttonow said we should focus on ways to effectively influence the decision makers and this data will help make a more effective argument. Holloway said Martinez is developing a report of issues submitted to TAP. A focus group may be requested if needed after evaluating that information according to Jeans and Holloway.

### **Outreach Report**

Buttonow asked the members to send current and any legacy reports that may be outstanding. We are working on an article template to get articles published in local newspapers for more public outreach.

### **Internal Communications Committee**

The newsletter just released, and we are working on Annual Report. Buttonow plans to have it completed by September 25-26, 2020, to include a short window for the review. Holloway will share the article template with Analitis to be used in the Chicago Tribune as outreach.

### **Action Items Summary**

- August minutes posted.
- Forward approved issues for review then JC.
- Holloway to follow up with members regarding activity reports.
- Issue 36435 awaiting information from IRS.
- Issues related to 43331 will be reviewed during working meeting.

### **Closing**

Buttonow thanked everyone for a very productive meeting. Jeans thanked everyone and closed the meeting.

**The next monthly meeting for the Taxpayer Communications Committee  
will be on October 13, 2020, at 12:00 -1:00 PM EST.**

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



**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.**



**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.**



**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](http://www.irs.gov), and encouraged members to review any IRS updates. The virtual all TAP meeting will be on June 18<sup>20</sup>, 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](http://www.tapspace.org)
- This year's Tax Forums will be conducted virtually.
- There are new Filing options available on [www.tapspace.org](http://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.**



**Taxpayer Assistance Center (TAC) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 12, 2020**

**Designated Federal Officer**

- Susan Jimerson                      Chief, TAP West

**Members Present**

- |                     |                   |            |
|---------------------|-------------------|------------|
| • Patrice Brown     | Brooklyn, NY      | Member     |
| • Edward Donovan    | Holly Springs, NC | Member     |
| • Paula King        | Lexington, KY     | Member     |
| • Ying Sa           | Des Moines, IA    | Member     |
| • Thurston Smith    | Memphis, TN       | Vice Chair |
| • Kathryn Tracy     | Buckeye, AZ       | Member     |
| • Nina Tross        | Apollo Beach, FL  | Chair      |
| • Anthony Whitmarsh | San Marcos, CA    | Member     |
| • Jessica Wilson    | Byram, MS         | Member     |

**Members Absent**

- |                   |                |        |
|-------------------|----------------|--------|
| • Sheila Campbell | Washington, DC | Member |
| • Licia Haynie    | Kaneohi, HI    | Member |

**Visiting Member**

- |                  |                 |                |
|------------------|-----------------|----------------|
| • Robert Moretti | Great Falls, MT | TAP Vice Chair |
|------------------|-----------------|----------------|

**Staff**

- |                      |                          |
|----------------------|--------------------------|
| • Matthew O'Sullivan | Program Analyst          |
| • Rosalind Matherne  | Program Analyst          |
| • Michael Odom       | Wage & Investment        |
| • Tamikio Bohler     | Wage & Investment        |
| • Annie Gold         | Administrative Assistant |

**Roll Call**

Quorum was met.

**Welcome**

Susan Jimerson opened the meeting and welcomed everyone to the call. A review of the Agenda was shared. Terrie English could not be on the call to provide the National Office Report. The upcoming meetings are as follows:

- Joint Committee monthly meeting is scheduled for May 28, 2020 beginning at 1:30 p.m. ET. The meeting is open to the public.
- Internal Communications Committee (ICC) next scheduled meeting is on May 25, 2020 beginning at 3:00 p.m. ET. They have elected their Chair and will go over the projects they are working on.
- Thurston Smith will give a report on the Outreach Committee



- National Office will be scheduling their Quarterly All TAP meeting for June. More information will be shared with the time and date as it becomes available
- Recruitment Interviews will begin at the end of May. There will be a solicitation going out to members to participate in the interview sessions. Lisa Billups will send an Email to members with the information.

### **Chair Report**

Nina Tross welcomed everyone to the meeting. The VITA Project is seeking volunteers to participate. TAP members were encouraged to reach out to their local LTAs for any activities scheduled to possibly attend and help with Outreach activity.

### **Minutes for Approval**

- March 23 - 24, 2020 minutes approved with correction
- April 14, 2020 minutes approved as submitted

### **Members of the Public**

N/A

### **Program Owner Report**

Tamikio Bohler stated there were no updates at this time.

### **Screening Report**

Patrice Brown shared the following updates for the Screening Report Issues. Several issues were dropped and others were kept to gather additional research:

- **41477 Form 433-A Reviewing Installment Agreement** , Taxpayer received Form 4338 with ten days to respond, could not get in contact with IRS. Received a second notice to reach out to IRS. They will be contacting IRS for information
- **41527 Failure of the IRS Web Site** , Taxpayer had issues with the Direct Pay system. O'Sullivan attempted follow up with Taxpayer with no response. Revisit during next month's meeting
- **41706 Quality of Service, Confidentiality, Privacy.** Taxpayer referred to virtual terminal and concern with privacy at the terminal. They will do more research on this issue.
- **41540 Open Season For IRS Advisory Committees.** Taxpayer wanted to know of an easier way to obtain information on the Taxpayer Advisory Committee.

**Decision: Full Committee Consensus accept Screening Committee's report as presented.**

### **Subcommittee Reports**

#### **Subcommittee 1**

O'Sullivan stated Subcommittee 1 had their meeting on May 5, 2020 and reviewed the following Issues:

- **40708 IRS Appointment**, IRS provided a response Taxpayers are not considered missed appointment until fifteen minutes late. Submitter did



not provide contact information for follow up. Subcommittee 1 recommended this issue be Dropped.

- **40634 Refund** and **40404 Taxes** deal with Taxpayers wanting to receive their refunds quicker. IRS has a normal twenty-one days for processing. Dropped
- **40462 Stand Still With Transcript and Innocent Spouse**, deals with transcript and Innocent Spouse. Subcommittee 1 will do further research on this issue
- **40169 2017 Refund**, Delays in getting refunds out due to possible ID theft. Will consult with Special Projects. Subcommittee1 will keep this issue
- **40618 Au pair - Taxes**, Verification For 5013C, Subcommittee 1 will follow up with Special Projects Committee for any additional information
- **40513 Methods to Assist Taxpayers Who Visit a TAC Without an Appointment**, Visiting TAC without an appointment. Subcommittee 1 will do further research, before making the recommendation to work the issue or reject it.
- **38550 Taxpayers being Turned Away in Error at TAC Office**, Taxpayer turned away in error during visit at TAC office. Subcommittee 1 will gather further data and research
- Subcommittee 1 discussed the Newsletter. Nina Tross will write an article for submission

**Decision: Full Committee Consensus accept Subcommittee 1 report and recommendation to drop issues as stated.**

## **Subcommittee 2**

Paula King stated Subcommittee 2 held their meeting. The following updates were shared on Issues:

- **40782 Provide Google Maps Link For All TAC Offices**, was forwarded to the Joint Committee
- **40311 Suggestion for Getting Transcripts**, working on doing more research
- **40698 Modify VITA Training to Include HSA Issues**, is still under consideration with IRS
- **40699 Expand VITA Scope to Include OIC Issues**, a summary will be provided to include the OIC issue. O'Sullivan received a response from IRS and will forward to the Full Committee for review during next month's meeting
- **41541 List of Tax Preparers** is a list of professional practitioners. Subcommittee 2 will do further research on this issue
- Ying Sa will be completing the article for the Newsletter for this month. Each member will take turns submitting an article.

**Decision: Full Committee Consensus accept Subcommittee 2 report as presented.**

Tross stated the 2020 VITA Project Review information has been sent out for volunteers. O'Sullivan sent an inquiry to IRS for the schedule and the agenda.

Bohler stated no further updates have been provided. She will follow up on where they are.

### **Outreach Report**

Thurston Smith shared the following:

- Thank you to members for turning in their Activity reports for the month
- Outreach Reports are due the 25<sup>th</sup> of each month
- Suggested adding a reminder on Outlook to assist in getting the reports in on time
- Smith is working on reviewing the Toolkit
- Members were encouraged to review the Outreach Toolkit and documents for helpful tips on doing outreach
- Reminder to members to document information and activities done that relates to TAP

### **Internal Communications Committee**

Discussion was held on the Vice Chair participation for Full Committee and Joint Committee meetings. Jimerson will follow up with Robert Moretti and provide guidance. ICC members are not totally responsible for submitting articles for the Newsletter. Any member can submit an article by the 25<sup>th</sup> of each month. This provides enough time for review and posting to be shared by the 5<sup>th</sup> of the month.

### **Action Items**

O'Sullivan stated:

- Update and forward Committee Minutes to Kevin Brown for posting onto [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Update Screening Report and Subcommittee Issues in SAMS
- Provide members with information for follow ups

### **Roundtable**

- There is no limit on the number of words requirement for Newsletter articles. One to two paragraphs were suggested
- Jimerson encouraged members to continue to be safe and healthy. COVID-19 current updates are posted on [www.IRS.gov](http://www.IRS.gov) website.

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, June 9, 2020,  
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 2:00 p.m. PT**



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 14, 2020**

**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     |
| • James Buttonow (Jim) | Summerville, NC | Vice Chair |
| • Lindsey Funair       | Dubois, PA      | Chair      |
| • Matthew Groff (Ryan) | Beverly, MA     | Member     |
| • Hercules Iraklis     | Urban, IL       | Member     |
| • Ai Lin               | China Lake, CA  | Member     |
| • Cedric Obiaka        | Omaha, NE       | Member     |
| • Leigh Ann Wood       | Columbia, SC    | Member     |

**Members Absent**

- |                |              |        |
|----------------|--------------|--------|
| • Hodari Brown | Red Wood, MI | Member |
|----------------|--------------|--------|

**Staff**

- Rose Babb, Management Assistant
- Alton Berger, Public Affairs Specialist
- Tamikio Bohler, W&I Program Analyst
- Terrie English, TAP Director
- Gilbert Martinez, TAP Program Analyst
- Robert Moretti, TAP Vice Chair
- Antoinette Ross, TAP Analyst

**Roll Call**

There were no public members on the call.

**Quorum**

Quorum was 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 proceeded with the agenda.



### **National Office Report**

English welcomed all to the meeting and reported the following:

- The IRS is receiving daily updates on the COVID-19 pandemic including the Economic Stimulus Package.
- Be very vigilant to scammers pretending to be government employees.
- The new National Taxpayer Advocate (NTA), Erin Collins started last week; she will have a meet and greet via teleconference with TAS staff via teleconference on April 9, 2020.
- Any new updates gathered from the Stimulus package during the teleconference with the NTA for taxpayers will be shared with the TAP panel members.
- Members are encouraged to send emails with questions they may have to English.

### **DFO Report**

Jeans shared the following:

- TAP Recruitment period has been extended until April 20, 2020 for the year 2021. Members are encouraged to share this recruitment effort with their neighbors and friends. Job announcement can be found on [improveirs.org](http://improveirs.org).
- News Release examples are available for members to tweak for their outreach events or for submission to member's local news outlets. Note that the new NTA, Erin Collins name should replace Nina Olson before distributing any literature to the public.
- If members are interested in conducting virtual outreach events and, would like to make presentations, the TAP Staff can assist with setting up WebEx sessions. These events can be facilitated only during business hours, Monday through Friday 8:00am – 4:30 p.m. ET. Reach out to your TAP Analyst for assistance.
- For the latest updates on COVID-19, members were asked to subscribe to [IRS.gov/COVID](https://www.irs.gov/COVID).
- Business cards were ordered and will be available in a few weeks; an email will be sent out to inform members once it arrives.

### **Minutes Approval**

The draft minutes from the TAP 2020 Virtual Face to Face Meeting in March was approved for posting to [improveirs.org](http://improveirs.org)

### **Subcommittee1**

- **Issue 40485:** IRS Tax Calendar
- **Issue 37272:** Communication for Military Personnel

The subcommittee has started researching and working both issues.



**Issue 42087:** IRS Free File Program- both subcommittee 1 and 2 are working this issue. Awalt stated that she will work with Analyst Martinez to provide a Subject Matter Expert to answer questions from both subcommittees. This teleconference call is scheduled for May 4.

### **Subcommittee 2**

- **Issue 40224:** Provide TAP Link on IRS.gov website the subcommittee will discuss - this issue will be placed on the Joint Committee agenda for discussion on April 23.
- **Issue 42334:** Taxpayer Communication and Online Tool to address CARES Act Stimulus Payments- this issue will also be placed on the Joint Committee agenda for further discussion on April 23.

### **Screening**

Martinez mentioned that there are a few issues to be screened. Buttonow, Jordan and Obiaka will have a meeting to review those issues. At the next full committee, the screening committee will share any issues that may need further review to determine if they will be worked by TCC.

### **Action Items**

- Issues 40224 and 42334 will be on the Joint Committee's calendar for April 23.
- For the latest information on the stimulus, refer to: **[www.irs.gov/covid-19](http://www.irs.gov/covid-19)**

### **Closing**

Jeans and Martinez 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 **May 12, 2020 at 12:00 -1:00 p.m. ET.**

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



**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](http://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.**