

**Taxpayer Communications  
Project Committee Meeting  
Monthly Meeting Minutes  
March 9, 2021**

**Designated Federal Officer (DFO)**

- Cedric Jeans Designated Federal Office

**Member Attendance**

- |                        |                     |            |
|------------------------|---------------------|------------|
| • Hercules Analitis    | Chicago, IL         | Member     |
| • Patricia Anthony     | Garland, TX         | Member     |
| • Marlon Bell          | Pearland, TX        | Member     |
| • Hodari Brown         | Redford, MI(Absent) | Member     |
| • James “Jim” Buttonow | Summerfield, NC     | Vice Chair |
| • Rita Green           | Memphis, TN         | Member     |
| • Ai Lin               | China Lake, CA      | Member     |
| • Donna Patterson      | Bothell, WA         | Member     |
| • Tracey Randall-York  | Ontario, CA         | Member     |
| • Joanne Thurston      | Marietta, GA        | Member     |
| • Leigh Ann Wood       | Columbia, SC        | Vice-Chair |

**Staff**

- |                          |   |
|--------------------------|---|
| • Kevin Brown            | TAP Secretary                               |
| • Terrie English         | TAP Director                                |
| • Conchata Holloway      | TAP Program Analyst                         |
| • Antoinette “Toni” Ross | TAP Program Analyst                         |
| • Fred Smith             | TAP Program Analyst                         |
| • Dale Hawkins           | Sr. Tax Analyst Wages and Investments (W&I) |
| • Debra Awalt            | Program Analyst W&I                         |
| • Mike Odom              | Program Analyst W&I                         |
| • Leslie Henley          | Program Analyst W&I                         |

**Roll Call**

Quorum was met.

**Public**

None

**Welcome/Announcements/Comments/Acknowledgement of Citizens**

Jeans opened the meeting at 12:00pm ET and welcomed all who joined.

**National Office Report**

English reminded the members of the All TAP quarterly meeting on

March 18, 2021 at 2:30pm. The National Taxpayer Advocate (NTA), Erin Colins, the Executive Director of Communications, Stakeholder Liaison & Online Services (CSO), Maryclaire Ramsey and the Deputy Executive of CSO, Sheila Andrews, will attend. The first Joint Committee meeting is March 25, 2021 at 1:30pm ET. English reported that the tax forums will be virtual again this year and TAP will have its own virtual room to be staffed by TAP members.

### **DFO Report**

Jeans encouraged the members to update their public facing and internal facing biographies on the [www.tapspace.org](http://www.tapspace.org) website. Let the staff know if you have any problems. The staff is setting folders set up right now, and we welcome suggestions if you want to enhance or change anything on the site.

The business cards and badges are being printed and will go out in about a month. Returning members should make staff aware theirs need to be changed. We hope to have Annual Report completed soon. This report covers the TAP 2020 year and is a good source of information for new members.

### **Approval of Minutes**

February 9, 2021 minutes, Wood motioned, Bell seconded.

**Action:** minutes approved as amended.

### **Outreach Report**

Wood asked members to please submit activity reports if you have not already. Ask any questions if you have them. We had a few outreach activities in North Carolina and California. The first Outreach Committee meeting will be on March 17, 2021 at 2:00pm. Buttonow thanked Patterson for getting the newsletter report out.

Holloway said the news release template is ok to be used now. Members should maintain or establish contacts with local news organizations and the staff will help with this if help is needed. Jeans encouraged members to reach out to the Local Taxpayer Advocates by email or phone. Patterson will complete the newsletter report this month.

### **Subcommittee 1 Report Out**

- Issue 41900 Accelerate Online Accounts for Taxpayers

This issue can be brought up to the NTA or CSO on the TAP Quarterly meeting.

- Issue 41768 Accelerate Online Accounts for Professionals

This issue can be brought up to the NTA or CSO on the TAP Quarterly meeting.

- Issue 36435 Penalty Relief

Buttonow encouraged members to set up an online account with their mobile devices to see what access you have from such a device.

- Issue 44227 Consolidation of IRS SP Offices. Issues returned back to Subcommittee 1 for recommendations.

- Issue 42572 Acknowledge TP's Tax Returns

Buttonow said because the IRS is still behind processing paper returns, is there an electronic response available? Awalt said Electronic Tax Administration Advisory Committee (ETAAC) is working this issue on status responses for both paper and electronic returns.

### **Subcommittee 2 Report Out**

- Issue 44163 Improving Refundable Credits Education

Wood said they want our help on how to get this information out to taxpayers and educating taxpayers on how to use these credits. This is being worked currently.

- Issue 43623 Communicating with IRS via Text/Email

Wood said we are not sure when it is coming to online accounts.

- Issue 40425 The Tax Calendar returned back to Subcommittee 2 for additional recommendations
- There was an issue about who the owner of this issue. The committee will work this according to the suggestion received.

- Issue 40148 Multiple Year "WMR" Tool (IRS Response)

Back to subcommittee to determine who it is going to in IRS.

- Issue 40485 Tax Calendar (IRS Response)

Back to subcommittee to determine who it is going to in IRS

- Issue 43838 Provide a link to Publication 4019 on the "third-party authorization purpose" page (IRS Response)

Back to subcommittee to fix the referral.

Green spoke about working with Low Income Taxpayer Clinics (VITA) for issues. English mentioned that VITA has reached to TAP to work together this year. Holloway will send Internal Communications meeting invite to the committee when it goes out.

### **Action Items Summary**

- Post approved meeting Minutes.
- Members will contact Holloway if they need assistance in finding a contact for their news release in their area.
- Donna volunteered to write the Newsletter report for April newsletter.
- Activity Reports are due by the twenty-fifth of each month.
- Subcommittee 2 will review IRS responses to Issues 43838, 40485, 40148 and revise if necessary, before sending to the appropriate function (W&I).
- Member to search for TAP on Facebook and other social media sites.
- Recommend all members create or review their IRS online account and discuss findings in the next meeting.



**Closing**

Buttonow thanked everyone for joining the meeting. Jeans closed the meeting at 1:01pm ET.

**The next monthly meeting April 13, 2021 at 12:00pm ET.**

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