

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, May 11, 2021**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |                        |                 |            |
|------------------------|-----------------|------------|
| • Hercules Analitis    | Chicago, IL     | Member     |
| • Patricia Anthony     | Garland, TX     | Member     |
| • Denise Besson        | Trufant, MI     | Member     |
| • James "Jim" Buttonow | Summerfield, NC | Vice Chair |
| • Rita Green           | Memphis, TN     | Member     |
| • Donna Patterson      | Bothell, WA     | Member     |
| • Tracey Randall-York  | Ontario, CA     | Member     |
| • Joanne Thurston      | Marietta, GA    | Member     |
| • Leigh Ann Wood       | Columbia, SC    | Vice-Chair |

**Members Absent**

- |               |                |        |
|---------------|----------------|--------|
| • Marlon Bell | Pearland, TX   | Member |
| • Ai Lin      | China Lake, CA | Member |

**Staff**

- |                      |  |
|----------------------|--|
| • Terrie English     | TAP Director   |
| • Conchata Holloway  | TAP Program Analyst                                      |
| • Rosalind Matherne  | TAP Program Analyst                                      |
| • Matthew O'Sullivan | TAP Program Analyst                                      |
| • Fred Smith         | TAP Program Analyst                                      |
| • Annie Gold         | TAP Administrative Assistant                             |
| • Debra Awalt        | Wage & Investment Customer Account<br>Services (W&I CAS) |
| • Michael Odom       | W&I Operations Support                                   |

**Quorum**

A quorum was met.

**Welcome /DFO Report**

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the Agenda was shared and the following DFO updates:

- Members were reminded to take advantage of the valuable information on the [www.IRS.gov](http://www.IRS.gov) website

- News articles, Tax tips that IRS has are posted by TAP Staff onto [www.TAPSpace.org](http://www.TAPSpace.org) continually. This information will be valuable and helpful in doing project work and for Outreach activities
- Internal Communications Committee will have a monthly meeting on May 19, 2021, beginning at 12:00 PM, EDT. They discuss the monthly Newsletter, the administration of the Facebook page and other communication issues related to TAP
- The Outreach Committee's monthly meeting will be May 19, 2021, starting at 2:00 PM, EDT. Nina Tross, TAP Vice Chair is the lead for this committee
- The Joint Committee will have their monthly meeting on May 27, 2021, beginning at 1:30 PM EDT. Bob Moretti TAP Chair is the lead. The Vice Chairs, ICC and Tross will be in attendance. Members were encouraged to attend the meeting to get a better understanding of what happens during the Joint Committee meetings

### **National Office Report**

Terrie English greeted everyone on the call. The following information was share:

- IRS filing season last day to file timely is May 17, 2021. Members were encouraged to visit [www.IRS.gov](http://www.IRS.gov) website for information on timely filing
- The Chairs and Vice Chairs will participate in a focus group for Underserved Native Americans will meet on May 20, 2021 beginning at 12:00 PM, EDT. Members were encouraged to attend
- TAP Quarterly Meeting will be held on June 17, 2021. The meeting will begin at 1:00 PM EDT. Members were asked to reserve the date and encouraged to attend
- TAP Recruitment period has been extended to June 01, 2021. Members were encouraged to get the word out to individuals who may be interested in becoming a TAP member. This would be considered part of Outreach activities
- TAP Business cards and ID Badges were mailed out to members. If anyone did not receive them, they were advised to promptly contact the Analyst for follow up

### **Chair Report**

Jim Buttonow verified the extended date for the Recruitment applications is on June 01, 2021. He welcomed Denise Besson, TCC newest member to the committee. The following updates were shared:

A brief overview from the 30-page report he reviewed was shared pertaining to some of the things happening in Congress and IRS

- TITGA performs a filing season report to see how IRS is doing
- Work is being on the Online account issue
- Discussions were held concerning getting an IRS online account set up
- The report contains recommendations on improving customer service
- Commissioner Charles P. Rettig will speak on Tax Gap later in a meeting

- Increase in funding for IRS is anticipated
- Progress was made by IRS in online services
- **Issue #41768**, Accelerate Online Account Issue IRS is currently working the issue and it has been pushed up a year
- Two recommendations were approved by the Joint Committee on Fresno Service Center Closure and the Tax Calendar issues

### **Minutes Approval**

Joann Thurston moved that the Minutes of April 08, 2021, be approved with corrections. Patricia Anthony seconded. The motion was adopted.

### **Members of the Public**

No members of the public were present.

### **Subcommittee 1**

Buttonow shared the following updates:

- **Issue #44227**, Fresno Submission Processing Service Center Closure; the processing center is closing on June 18, 2021 and after this date the following centers will be affected in California, Washington, Alaska, Ohio, and Hawaii
- During the last Joint Committee meeting there were two recommendations for the Post Cards as well as New Release. Extended filers will be affected
- Three additional recommendations are now being worked and plus a request around the communications on the Social issue. Donna Patterson prepared the referral. Patterson forwarded information to Buttonow and Conchata Holloway to be used as an aide to Outreach. Holloway will discuss with Leigh Ann Wood to make sure the information is correct for the Outreach Committee
- The three recommendations are for Spec, Tech, and VITA to update their sites, communication, and materials to provide Taxpayers with the information

**Decision: Full Committee consensus accept to referral for approval subject the approval of SA and the Attorney Advisor**

**Buttonow motioned and Wood seconded  
Motion adopted**

- **Issue #41883** Tax Lien Payoff the Committee received a positive response from IRS. The response was accepted IRS and will monitor for implementation. Debra Awalt will notify the committee of the implement date

**Decision: Full Committee consensus to close Issue 41883.**

**Buttonow motioned and Wood seconded**

**Motion adopted**

- **Issue #41900** and **#41768**, Accelerating IRS Online Accounts for Taxpayers and Tax Pros. This issue was elevated to the Joint Committee. A copy of the draft recommendation was forwarded to each member to review. Members were asked to submit any comments to him with an Email message. Awalt informed the committee IRS looking forward to implementation later in the year

**Subcommittee 2**

Wood shared the following updates:

- **Issue #43623** Taxpayer unable to reach IRS. Subcommittee's recommendation is to close this issue and place on the Online Account.

**Decision: Full Committee consensus to close Issue #43623**

**Buttonow motioned and Joann Thurston seconded**

**Motion adopted**

- **Issue #44163, Refundable Credit** the Subcommittee discussed how to get more visibility and awareness out to the public. Copy of answers to questions received were shared with members. Members were asked to forward any suggestions or comments on visibility and awareness to her and send a copy to Holloway

**Outreach**

Wood stated she did not attend last month's meeting. Members were reminded to submit their Activity reports for the month. Members were asked to send Wood an Email message with questions and or concerns. Hours are needed to show all activity being done. More information will be shared during next month meeting

**Internal Communications Committee (ICC)**

Patterson stated

- ICC reviewed the content and format for the Newsletter
- Jimerson added the articles are due by the twenty-fifth of the month
- Input from the committee to be included in the article due by the twenty-fifth of the month
- New members are being accepted into the Facebook group
- Facebook will be discussed during their next month's meeting
- Buttonow will draft the article for submission for TCC by the for this month

**Action Items**

Holloway shared the following Action items:

- Forward approved TCC April 2021 Meeting Minutes to Kevin Brown for posting
- Update SAMS with approved **Issue #44227** to Joint Committee subject SA and Attorney Advisor's review
- Close **Issues #448813** accepted IRS response
- Close **Issue #44623** and feature in Online account
- Recommendations on **Issue #44163** to be shared with Woods and Holloway
- Activity reports are due by the twenty-fifth of each month
- Questions or concerns bring to attention of Buttonow
- **Issue #41900** and **#41768** Buttonow will share information with members

Jimerson thanked the members for their attendance and participation on the call. Members were encouraged to forward any concerns, suggestions or questions to Buttonow, Holloway or Jimerson.

**Close**

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, June 08, 2021  
12:00 PM EDT, 11:00 AM CDT, 10:00 AM MDT, 9:00 AM PDT**

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