

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, June 08, 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 |
| • 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 |
| • Tracey Randall-York | Ontario, CA | Member |

Staff

- | | |
|----------------------|----------------------------------------------------------|
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Antoinette Ross | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Debra Awalt | Wage & Investment Customer Account
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:

- Internal Communications Committee will have a monthly meeting on June 16, 2021, beginning at 12:00 PM, EDT. They discuss the monthly Newsletter and other communication issues related to TAP
- The Outreach Committee's monthly meeting will be June 16, 2021 starting at 2:00 PM, EDT. Nina Tross, TAP Vice Chair is the lead for this committee
- TAP Quarterly Meeting will be held on June 17, 2021. This will be an administrative meeting and members were encouraged to attend
- The Joint Committee will have their monthly meeting on June 24, 2021 beginning at 1:30 PM EDT

National Office Report

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

- TAP Quarterly Meeting will be held on June 17, 2021. The meeting will begin at 1:00 PM EDT. Kenneth Corbin, Commissioner W&I Division will be on the call for questions. His team is working on some of the Issues TCC is working
- The Open Season for Recruitment is closed. The interview process is beginning for over three hundred applicants. Members will be receiving a Email asking for volunteers to assist with the interview process.
- The Joint Committee will have their meeting on June 24, 2021 beginning at 1:30 PM, EDT
- The Military Focus group meeting date will be shared with members soon. The group is excited Members were encouraged to participate with any information of being in the Military, know someone in the Military, family members, or work with someone who has been a part of the Military

Chair Report

Jim Buttonow welcomed members to the meeting. He agreed with having Kenneth Corbin, Commissioner W&I Division come and speak with the committee during the Quarterly meeting. Members were encouraged to participate in the TAP Interview process. An overview of the IRS filing stats was shared and possible new Issues relative to the Advanced Tax Credit for TAP to work. The following updates were shared:

- Three recommendations going to the Joint Committee related to the closing of the Fresno Service Center. A lot of great work was done by the committees on these recommendations.
- The committee will have discussions of some of the Screening Committee's features that have been consolidated.
- Discussion on Outreach opportunities relative to the closing of the Fresno Service Center will be done during today's meeting

Minutes Approval

Patricia Anthony moved that the Minutes of May 11, 2021, be approved with corrections. Buttonow seconded. The motion was adopted.

Members of the Public

No members of the public were present for comments.

Subcommittee 1

Buttonow stated the subcommittee has done a lot of work and shared the following updates:

- **Issue #36435**, Penalty Release; the subcommittee discussing data on abatement to give Taxpayers better awareness of penalties relative to failure to pay, failure to file and failure to file penalty estimated taxes done at the time of the Return. The five potential areas of recommendations: systemic allowances of first time abatement, reasonable cause, what would be the most qualified for penalty first time abatement, what does the word “abatement” mean to the average Taxpayer, and make first time abatement clearer. The subcommittee will have more on their recommendation next month
- **Issue #41900 and Issue #41768**, both are on the Accelerated Online Accounts development and adoption plan for Taxpayers and Tax professionals. Buttonow stressed this issue comes from the entire TAP committees to be elevated. Members were encouraged to read the report that was shared.
- Both Subcommittees discussed how to consolidate some of the Online Accounts features to not submit to IRS several Issues. Conchata Holloway explained the color-coded identifiers for combined issues. It will be reviewed and shared by the Screening Committee.

Subcommittee 2

Leigh Ann Wood shared the following updates:

- **Issue #40148** Where’s my Refund Tool, IRS response was received. Subcommittee 2 made the decision to accept IRS response and put it back into the broader Online Account Feature List for tracking progress and close the Issue.

Buttonow motioned and Anthony seconded

Motion adopted

Decision: Full Committee Consensus to accept close Issue #40148

- **Issue #44163, Refundable Credit**; Wood provided a copy of the recommendations prior to the meeting. The Issue will be broken into two separate parts, accuracy referral and awareness referral. By the next

subcommittee meeting the referrals are anticipated to be completed and ready to move forward for approval

- **Issue #43838**, Subcommittee 2 will have a Subject Matter Expert (SME) attend their next meeting to answer questions on this Issue

Screening Report

Buttonow stated the Screening Committee reviewed a total of thirty-seven Issues for the month of May. The report was color-coded for similarities and to get through more quickly.

- Nineteen of the Issues were of a personal and non-issues
- One Issue is currently being worked by TCC
- Three referrals for other Committees and not TCC
- A group of ten Issues requesting Online account feature
- Four new Issues:
 1. Updating IRS Website – placed in the Parking Lot
 2. How to get information on entities
 3. SSA determinations
 4. Free Fillable Forms Software – placed in the Parking Lot
- The Screening Committee will have their next meeting on June 11, 2021

Leigh Ann Wood moved to accept the screening report, Joanne Thurston second.

Decision: Full Committee Consensus accept the Screening Report as submitted

Outreach

Wood stated the Outreach meeting for May was rather short.

- The Social Media wording information was shared on the Fresno closure with all the Vice Chairs. The Encouragement to members was shared to get the word out
- Next meeting is scheduled for June 16, 2021 beginning at 2:00 PM, EDT
- Wood will continue to share any additional information as it becomes available
- Thank you expressed to members for their submission of the Activity Reports. Anyone who has not turned in their report should do so. It is never too late
- Buttonow will send a reminder to members to help share the information through social media

Internal Communications Committee (ICC)

Donna Patterson thanked Matthew O'Sullivan for sending the Newsletter out to members and informed members the Newsletter should be in their inbox. The following updates were shared:

- The Newsletter was released on yesterday

- Discussions were focus around Facebook Page verses a Blog
- Personal information needs to be removed
- Control of Blog verses the Page and security
- Support for taking over the administrative portion of the Page, was sent to Terrie English, TAP Director
- Jimerson added the challenge is TAP is a member driven program

Action Items

Holloway shared the following Action items:

- Forward approved TCC May 11, 2021 for posting
- Update SAMS with close **Issue #40148**
- Update SAMS with the information from the Screening Report
- Update the Online Feature List with Debra Awalt
- Awalt added there was a News release with information on IRS is now in the process of releasing of Refunds
- Buttonow will submit the News article for the Newsletter
- Members encouraged to share any feedback with Buttonow relative to **Issue #41900** and **#41768**

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, July13, 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.