

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 10, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|------------------------|-----------------|------------|
| • Hercules Analitis | Chicago, IL | Member |
| • Patricia Anthony | Garland, TX | Member |
| • Marlon Bell | Pearland, TX | Member |
| • James “Jim” Buttonow | Summerfield, NC | 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 |

Members Absent

- Denise Besson Trufant, MI Member

Staff

- | | |
|----------------------|--|
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O’Sullivan | 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. Terrie English could not attend the meeting. An overview of the Agenda was shared with the following DFO and National Office updates:

- Internal Communications Committee will have a monthly meeting on August 18, 2021, beginning at 12:00 PM, EDT. They are working on the Facebook group being converted over to a Facebook page and the monthly Newsletter
- The Outreach Committee’s monthly meeting will be August 18, 2021 starting at 2:00 PM, EDT. The Vice Chairs attend this meeting. Nina Tross, TAP Vice Chair is the lead for this committee

- The Joint Committee will have their monthly meeting on August 26, 2021 beginning at 1:30 PM, EDT. The meeting will be for one and a half hours. It is open to the public. Members were encouraged to attend to learn more on the process that happens with the referrals
- On August 24, 2021 through August 25, 2021, the Joint Committee Planning Session will be held. TAP Committee Chairs, TAP Director and TAP Staff will be attending and are available for questions

Chair Report

Jim Buttonow welcomed members to the meeting.

- Member attendance in meetings was recognized and complimented
- A lot of work has been done by the committee members during the last two months.
- Five recommendations will be reviewed during today's meeting
- Tax Filing season status updates were shared
- The Fresno Center and More Outreach encouraged starting early September and October
- A lot of work has been done on the Online accounts and appreciation for the discussions Subcommittee 1 has contributed
- Updates shared on Tax Professional accounts, called Authorization Awareness that Subcommittee 2 has been working

Minutes Approval

TCC Minutes for July 13, 2021, approved as submitted.

Leigh Ann Wood moved to approve, and Ai Lin seconded. The motion was adopted.

Members of the Public

No members of the public were present for comments.

Subcommittee 1

Buttonow shared Subcommittee 1 updates on the five recommendations:

Issue #36435, Penalty Release; the subcommittee completed five recommendations and received one response back from IRS. Subcommittee 1 goal statement is to increase awareness and reduce Taxpayer burden and promote voluntary compliance and get back to fair and equitable Tax system.

1. IRS should automatically approve first time penalty abatement requests for qualified Taxpayers
2. Taxpayers with no priors and have a first-time penalty abatement with reasonable cause should not disqualify Taxpayers.
3. Allow STA as an option on www.IRS.gov
4. Use plain language other than "abatement"
5. Simplify what is First Time Penalty Relief or Abatement

Decision: Full Committee Consensus to approve all five recommendations for Issue #36435

Issue #41900 and Issue #41768, Accelerated Online Accounts development and adoption plan for Taxpayers and Tax professionals online accounts. Buttonow sent two recommendations back to the subcommittee to vote on for next month's meeting.

Subcommittee 2

Leigh Ann Wood shared the following updates:

- **Issue #43838**, Subcommittee 2 sent the rebuttal back to IRS. They decided to drop the recommendation of putting the chart on the page. They are submitting a rebuttal to place a link to the publications on three pages to make all pages that deals with third party authorizations for consistency
- **Issue #44163, Refundable Credit**; The subcommittee will have their recommendations finalized during their next subcommittee meeting and forward to the Full Committee on next month
- **Issue #50226**, Understanding of Form 944 Subcommittee 2 received a response from IRS on the questions submitted. They will discuss the answers received during their next subcommittee meeting to complete their recommendation. Buttonow encouraged both subcommittees members to submit any comments on this issue

Screening Report

Buttonow stated the Screening Committee was delayed on having their meeting and will be meeting later today. The report out will be shared with the Full Committee on next month.

Outreach

Wood stated due to members attending the Tax Forums they did not have an Outreach meeting on last month. They will have this month's meeting. A reminder to members to submit their Activity Reports if they have not already done so

- No consolidated report was received for this month
- Half of the members reports were received
- Members encouraged to submit their reports

Internal Communications Committee (ICC)

Donna Patterson provided an overview for the ICC update.

- The ICC met on July 21, 2021. They continued discussing the changes to the Facebook page. The Facebook page is beginning to populate content linking prior content and collateral to the page. The goal is to have it up and running by October 01, 2021. Members interested in working on the Facebook page are encouraged to contact ICC or Matthew O'Sullivan
- ICC is working on recommendation **#48806**, Review of the TAPSpace Member Guide for www.TAPSpace.org
- Buttonow volunteered to assist Patterson with the submission of the article for next month.

Action Items

Holloway shared the following Action items:

- Screening Committee Meeting on Tuesday at 2:00 PM, EDT
- Forward approved TCC July 13, 2021 for posting
- Forward approved Issue #36435 to the Joint Committee
- Any information to be included in the Newsletter should be forwarded to Patterson or Holloway
- Buttonow will email Holloway information to forward to Awalt
- Activity Reports are due the twenty-fifth of each month
- Patterson will submit the article with Buttonow's assistance for the Newsletter next month. Send any information to be added to Patterson or Holloway

Roundtable

- Michael Odom stated the W4-P Testing, IRS staff asking for volunteers to assist with the testing has been extended for two additional days, Monday and Tuesday of next week. Six additional TAP members are needed. Odom will be assigned on a work Detail for three months. Tamikio Bohler will be Acting Program Owner for the TAP program while he is away. Odom will send a confirmation email will to Patterson on the status of her assistance request
- Patterson and Wood will discuss possible Outreach opportunities from future speaking engagements

Jimerson informed the committee the Activity report is ready and available. Holloway will forward to Wood on today. Thank you expressed to the members for their attendance and participation on the call.

Close

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, September 14, 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.