

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, September 14, 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 | Chair |
| • Ai Lin | China Lake, CA | Member |
| • Donna Patterson | Bothell, WA | Member |
| • Tracey Randall-York | Ontario, CA | Member |
| • Joanne Thurston | Marietta, GA | Member |

Members Absent

- | | | |
|------------------|--------------|------------|
| • Marlon Bell | Pearland, TX | Member |
| • Rita Green | Memphis, TN | Member |
| • Leigh Ann Wood | Columbia, SC | Vice-Chair |

Staff

- | | |
|----------------------|--|
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Debra Awalt | Wage & Investment Customer Account
Services (W&I CAS) |
| • James Bellinger | 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 be on the call today. The following Designated Federal Official and National Office updates were shared:

- The Recruitment package is in the approval phase. Recommendations for Members and Alternate positions are moving forward. The package has

- gone through the background and compliance checks. It will now be forwarded through the approval phase to the TAP Director, the CSO Executive, The National Taxpayer Advocate, IRS Commissioner and the final stop will be with Treasury
- The Joint Committee Annual Planning Session was held in August. They had discussions on the 2022 TAP year outlook. Ken Corbin, Chief Taxpayer Experience attended and shared how IRS is going forward making improvements to the different processes and systems. He provided insight on some of the challenges IRS is experiencing. He answered questions provided by the Chairs
 - TAP 2022 Chair and Vice Chair elections will be held in mid-October. There will be an informational session on the positions of the National TAP Chair and Vice Chair. Members will obtain information on what it is like being in leadership roles at the National level representing TAP. More information will be shared. Members were encouraged if interested in the positions to attend
 - TAP 2021 Annual Report Committee will take the reports from each of the Chairs, Internal Communications Committee (ICC) and the Vice Chairs on the activities during 2021 to be added in the Annual Report together. This committee has a process to report out on all the work of the TAP members available to the public
 - TAP year end is approaching with the last day on November 30, 2021. The last Joint Committee meeting will be November 18, 2021. Members were encouraged to continue working on projects. There is one final month to complete projects and forward to the Joint Committee to be added to their agenda for the last meeting of the year
 - ICC will have their monthly meeting on September 15, 2021 beginning at 12:00 PM, EDT
 - The Outreach committee will have their monthly meeting on September 15, 2021 beginning at 2:00 PM, EDT
 - The Joint Committee will have their monthly meeting on September 23, 2021 beginning at 1:30 PM, EDT. The meeting is open to the public

An overview of the Agenda was shared with the committee.

Chair Report

Jim Buttonow welcomed members to the meeting and shared the following:

- The Joint Committee had their Planning Session. Ken Corbin attend the two-day session. Good dialogue and feedback were shared on improving TAP. Corbin has a lot of responsibilities.
- Remote challenges were discussed: participation, research, real time influence and online accounts

- The mentorship program worked well this year; improvements can be made
- Two months remaining for work in the committee. There are seven recommendations to be completed. Member participation is critical for Subcommittees and work within the full committee
- Submission of Activity reports are important. Buttonow will send a reminder checklist to members. Members were encouraged to submit their reports and account for all hours with copies to Leigh Ann Woods, Conchata Holloway and TAP mailbox.
- A lot of work is being done outside of the Subcommittees. Members were encouraged to respond to all Emails. Responses with no additional questions are required
- There will be a Screening Committee meeting later today. Holloway will share the information. Members needed to assist in getting through the issues. Members who are available were encouraged to attend the meeting
- Members were asked to assist in the completion of the Annual Report. Buttonow would like a volunteer to edit and check for grammatical errors
- Members encouraged to think of putting their name in for one of the Leadership positions and make their interest known
- The five recommendations submitted to the Joint Committee were approved and sent forward to IRS
- Tomorrow is the final day for Business Returns

Minutes Approval

Ai Lin moved that the Minutes of August 10, 2021, approved as submitted. Hercules Analitis seconded. The motion was adopted.

Members of the Public

No members of the public were present for comments.

Subcommittee 1

Buttonow shared Subcommittee has seven recommendations are with IRS: The first two Issues were consolidated:

- **Issue #41900 and Issue #41768**, both are on the Accelerated Online Accounts development and adoption plan for Taxpayers and Tax professionals online accounts. They are with IRS and Subcommittee 1 anticipates discussion with the Full Committee during next month's call
- The next Issue is on the Status of Amended Tax Returns is in a hold status. Five questions were forwarded to IRS. If there are any additional comments or questions to add, members where encouraged to share

Subcommittee 2

Buttonow shared the following updates for Subcommittee 2: The Subcommittee has done a lot of work on:

- **Issue #44163, Refundable Credit** five recommendations were forwarded to the IRS getting more awareness and more accuracy. IRS will vote on them next month
- **Issue #50226**, Understanding of Form 944 the subcommittee is working with Tax Forms and Publications on this issue. They submitted a lot of questions to IRS. Responses were received and Members were encouraged to read over them. Buttonow will share the responses with the committee. Buttonow will meet with Martha Lewis to find out where they are on the issue and report back to Leigh Ann Wood
- **Issue 42958**, Injured Spouse Receiving EIP Payments is a new issue brought to Subcommittee 2. Discussion will be held during next month's meeting

Screening Report

Buttonow stated the Screening Committee will meet Tuesday at 2:00 PM, EDT. Holloway will send information to members on today.

Internal Communications Committee (ICC)

Buttonow stated the following updates:

- The last Newsletter sent forth highlighted what was put forward.
- Buttonow volunteered to complete the next article

Outreach

Buttonow stated he reached out to his LTA for possible Outreach opportunities. Members were encouraged to try and reach out to their LTA once each month.

Action Items

- Buttonow volunteered to do the next Newsletter article for ICC
- Buttonow will send the Activity Report list

Holloway shared the following Action items:

- Forward TCC approved August 10, 2021 Minutes to Kevin Brown for posting
- There will be a SME on each Subcommittee's meeting. Subcommittee 1 they will have a SME from Online Services. All members are invited to attend. Subcommittee 2 will have a SME to discuss F944 Issue 50226 and all members are invited
- Shared the advice from another Committee to contact student colleges for possible Outreach opportunities
- Follow up with members on Activity Reports

Roundtable

Buttonow stated he has noticed two things:

- a lot of issues are related to the Advanced Child Tax Credit
- the inability to get through to IRS

Jimerson thanked Buttonow for leading the meeting. Thank you to members for their attendance and participation.

- September is Disaster Preparedness month. Members were encouraged to read over the information shared in the Newsletter
- A Blog from the National Taxpayer Advocate was posted on some of the challenges TAP is going through servicing Taxpayers. Members were encouraged to read over the information.

Close

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, October 12, 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.