

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, October 12, 2021**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- |                       |              |            |
|-----------------------|--------------|------------|
| • Hercules Analitis   | Chicago, IL  | Member     |
| • Patricia Anthony    | Garland, TX  | Member     |
| • 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 |
| • Denise Besson        | Trufant, MI     | Member |
| • James “Jim” Buttonow | Summerfield, NC | Chair  |
| • Ai Lin               | China Lake, CA  | Member |

**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<br>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. Overview of the Agenda and the following Designated Federal Official updates were shared:

- October 13, 2021 there will be a Informational Session with the roles and responsibilities of the TAP Chair and Vice Chair positions. Members

- interested were encouraged to attend the session. The National TAP Chair, Robert Moretti and Vice Chair Nina Tross will be on the call to answer questions
- The development of the 2021 TAP Annual Report underway and is being led by TAP Analyst, Gilbert Martinez. More information will be shared on the committee's meeting
  - November 30, 2021 will be the end of 2021 TAP year. Members were encouraged to work on finishing up any updates to Activity reports
  - The Joint Committee will have their last meeting on November 18, 2021. Committees were encouraged to complete and approve any referral prior to this date
  - ICC will have their monthly meeting on October 20, 2021 beginning at 12:00 PM, EDT. They will look at Facebook and the updates of the TAP Annual Report
  - The Outreach committee will have their monthly meeting on October 20, 2021 beginning at 2:00 PM, EDT
  - The Joint Committee will have their monthly meeting on October 28, 2021 beginning at 1:30 PM, EDT. The meeting is open to the public

### **National Office Report**

Terrie English shared the following National Office updates:

- TAP Graduation Ceremony is quickly approaching for members who will be graduating off TAP. This appreciation ceremony will recognize their remarkable work over the last few years. The date has not been scheduled but information will be forwarded to each member. Members were informed the ceremony will be held in November
- There have been some Focus groups to be rescheduled due to conflicts. Information will be shared after approval with the dates by the end of the month
- A corrected 2020 Annual Report will be sent to each member due to a printing error. Members were advised to look for their copy in the mail

### **Chair Report**

Leigh Ann Wood greeted everyone attending the meeting and shared the following:

- Jim Buttonow shared some bullet points to bring out during the Chair Report
- The Joint Committee approved several items. One issue that did not get unanimous approval centered around Free Filing
- The Annual Report is underway
- The Election process for next year leadership has begun
- The Filing deadline for extension is October 15, 2021

- The Fresno Closure news releases has been implemented and sent out. Great job expressed to members for the work done

### **Minutes Approval**

Tracy Randall York moved that the Minutes of September 14, 2021, approved as submitted. Patricia Anthony seconded. The motion was adopted.

### **Members of the Public**

No members of the public were present for comments.

### **Subcommittee 1**

Wood shared the following updates for Subcommittee 1:

- **Issue #41768**, Accelerated Online Accounts development and adoption plan for Taxpayers and Tax professionals online accounts is recommended for approval to forward to the Joint Committee  
**Joanne Thurston motioned, and Donna Patterson seconded**  
**Decision: Full Committee Consensus to forward Issue #41768 to the Joint Committee for approval**
- **Issue #43684**, Status of Amended Tax Returns Subcommittee 1 is waiting respond from IRS on questions

### **Subcommittee 2**

Wood shared the following updates for Subcommittee 2:

- **Issue #44163**, Refundable Credit Subcommittee 2 is waiting for IRS responses
- **Issue #50226**, Understanding of Form 944 the subcommittee is working with Tax Forms and Publications on this issue. Recommendations are being consolidated by the original committee
- **Issue 42958**, Injured Spouse Receiving EIP Payments Subcommittee 2 recommended this issue be dropped  
**Wood motioned and Randall York seconded**  
**Decision: Full Committee Consensus drop Issue #42958**

### **Internal Communications Committee (ICC)**

Patterson stated the ICC met and discussed three items:

- Facebook page has been changed to Facebook group. ICC is look for a volunteer to be the administrator and content to share. Members were asked to reach out to Matthew O'Sullivan with their interest
- **Issue #48806**, Recommendation for TAPSpace Guide ICC used a Ad Hoc committee to review and revise the guide. Finalization to close this issue will be done during their next meeting on October 20, 2021
- The Ad Hoc Committee will work on the Annual Report
- Patterson volunteered to do the write up for October

### **Outreach**

Wood expressed thank you to members for continuing to do their Outreach Reports.

### **Action Items**

Conchata Holloway will do the following Action items:

- Forward TCC approved September 14, 2021 Minutes to Kevin Brown for posting
- Forward **Issue #41768** to Martinez to be added to the Joint Committee's agenda on October 28, 2021
- Update SAMS with **Issue #42958** as being dropped
- Patterson volunteered to submit the Newsletter article for November

### **Roundtable**

Wood opened the roundtable with questions anyone was having on any issue. There were none.

Jimerson expressed thank you to Wood for standing in for Buttonow on today's call. Thank you to everyone for attending the call and their participation.

Reminder to submit all Activity Reports. The TAP year end is approaching. The reports are vitally important to the TAP program.

### **Close**

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, November 09, 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.**