

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, March 30, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|------------------------|--------------------|-------------|
| • Richard Bell | Corpus Christi, TX | Member |
| • Denise Besson | Trufant, MI | Member |
| • James “Jim” Buttonow | Summerfield, NC | Member |
| • Ruth Guyon | Bellevue, NE | Member |
| • Jared Lefevre | Billings, MT | Member |
| • Victoria Ramirez | Sacramento, CA | Vice Chair |
| • Tracey Randall-York | Ontario, CA | Member |
| • Candice Smith | Mustang, OK | Member |
| • Joanne Thurston | Marietta, GA | Member |
| • Leigh Ann Wood | Columbia, SC | Chair |
| • Eugene Lillie | West Deptford, NJ | TFPL Member |

Members Absent

- Hercules Analitis Chicago, IL Member

Staff

- | | |
|-------------------------|--|
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Kevin Brown | TAP Administrative Assistant |
| • Tamikio Bohler | Wage & Investment Customer Account
Services (W&I CAS) |
| • Michael Odom | W&I Operations Support |
| • Gail Johnson | Staff Assistant W&I |
| • Aphillia “Lee” Hughes | Program Analyst W&I |

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided.

National Office

Terrie English welcomed members to the call and expressed her excitement in working with each member. She provided a brief introduction of herself.

- The Service is slowly opening back up and TAP is anticipating travel for Face-to-Face meetings and Outreach.
- Thank you to members from the TAP Staff in moving forward in trying to meet everyone.
- Members were reminded to obtain preapproval for any travel needs prior to participating in any Outreach.
- Each State has a Local Taxpayer Advocate (LTA) with some states having two LTAs.

Self Introductions

Each member was given the opportunity to introduce themselves. The TAP Staff followed with their introductions.

Meeting Procedures and Ground Rules

Conchata Holloway provided an overview of the TAP Ground Rules:

- Ideas, opinions, and concerns are important
- Allow each person to speak
- Time is valued and respected, meetings start on time and end on time
- Telephone etiquette (mute phones when not speaking) *6 to mute and unmute
- Our method of Communication is by using Email, phone or WebEx (make sure to send a copy to TaxpayerAdvocacyPanel@irs.gov and to your Analyst). Do not reply to all unless the message applies to all
- Member can call the Analyst with any concerns
- Call in to meetings five minutes prior to the start of the meeting is preferred. If anyone has problems signing onto WebEx, the Staff will be available and signed on thirty minutes prior to the start of the meetings to assist or answer question relative to getting on
- Participation is required
- Members were encouraged to reach out to the Analyst or management with any questions

- Agendas will be shared with the Chair, Analyst and DFO for review prior to sending to members before the start of each meeting
- Copies of the Pre-reads will be shared with each member and should be reviewed prior to the beginning of meetings. They will be posted on www.TAPSpace.org.
- The Full Committee will be divided into two Subcommittees
- Quorum is required to approve referrals and meeting minutes
- Members advised not to get discouraged
- Activity reports identify what you as a member have done during your volunteer time to the TAP. Eugene Lillie explained the importance of documenting your time and the need for details

Committee Chair and Vice Chair Election

Want to become a Chair or Vice Chair was opened for volunteer nominations or self-nominations. Holloway provided a brief description of the roles and responsibilities for both positions. Jimerson added additional guidance on the positions. English encouraged members to participate and appreciation to each member.

Congratulations to Leigh Ann Wood, TCC Chair for 2022 TAP year
Congratulations to Victoria Ramirez, TCC Vice Chair for 2022 TAP year

Minutes Approval

TCC Minutes for November 9, 2021 were approved as submitted.
Wood motioned and Buttonow seconded

Subcommittee 1 and Subcommittee 2 members assignment

- **Subcommittee 1:** Hercules Analitis, Tracey Randall York, Leigh Ann Wood, Ruth Guyon, Candice Smith and Denise Besson
- **Subcommittee 2:** Richard Bell, Jim Buttonow, Jared Lefevre, Victoria Ramirez, and Joanne Thurston
- **Leads** for each Subcommittee will be established during the first Subcommittee meetings

Meeting Dates Assigned

- **TCC Full Committee** meeting will be held every second Wednesday of the month beginning at 12:00 PM, EDT. Their first meeting will be held on April 13, 2022, at 3:00 PM, EDT
- **Subcommittee 1** will have their meeting every first Tuesday of each month beginning at 12:00 PM, EDT

- **Subcommittee 2** will have their meeting every first Wednesday of each month beginning at 12:00 PM, EDT

Outreach

Vice Chair, Victoria Ramirez is the lead for the Outreach. The schedule for the Outreach committee meetings will be shared soon.

Screening Committee

Tracey Randall York, Joanne Thurston, Richard Bell, Ruth Guyon and Jim Buttonow volunteered to be the members on the Screening Committee

Quality Review (QR)

Denise Besson, Victoria Ramirez, and Candice Smith volunteered for this committee

Leads for each committee will be established during their individual meetings.

Internal Communications Committee (ICC)

Matthew O'Sullivan is the TAP Analyst over the ICC, and he provided an overview of what the ICC committee does beside writing the Newsletter. Jimerson added ICC works on other projects such as the Speak Up Brochures, the Annual Report and other projects. Buttonow and Ramirez volunteered to be on this committee

IRS Responses

The following Issues were reviewed:

- **Issue #44227**, Consolidation of IRS Processing Center was partially adopted. Buttonow moved to accept IRS response and Thurston seconded
Decision: Full Committee Consensus to approve Issue #44227 and close
- **Issue #41768**, Added Feature in Online Account was tabled to next month's meeting
- **Issue #44163**, Refundable Credit was motioned by Wood and Buttonow seconded to accept
Decision: Full Committee Consensus to accept Issue #44163 and close

Program Owner

Mike Odom introduced Lisa Maddlen and Robert Adzenski to share information from W&I Subject Matter Expert (SME) view. They are seeking any information

from TAP and TAP resources to assist in processing E-Filing, assisting getting the word out to Taxpayers. Members were assured the SMEs would be available to answer questions upon request

Action Items

Holloway shared the following Action items:

- Forward TCC November 9, 2021, approved minutes to Kevin Brown for Posting.
- Email information with committee assignments to each member.
- Close **Issue #44227** and **#44163** as accepted IRS response.
- Update system with **Issue #41768** and send Odom an invitation to have an SME attend committee meeting.
- Send calendar invites to members for date and times of Full Committee, Subcommittee 1 and 2 meetings.
- **Issue #54250** assigned to Subcommittee 2.
- **Issue #54248** assigned to Subcommittee 1.
- Get members TAP Email address to Holloway to be posted in www.TAPSpace.org.

Close

Jimerson thanked members and the meeting was officially closed.

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