

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 13, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|------------------------|--------------------|-------------|
| • Hercules Analitis | Chicago, IL | Member |
| • 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 |
| • Candace Smith | Mustang, OK | Member |
| • Joanne Thurston | Marietta, GA | Member |
| • Leigh Ann Wood | Columbia, SC | Chair |
| • Eugene Lillie | West Deptford, NJ | TFPL Member |

Members Absent

- Tracey Randall-York Ontario, CA Member

Staff

- Terrie English TAP Director
- Conchata Holloway TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Annie Gold TAP Administrative Assistant
- Reginald Grimes W&I Program Analyst
- Leslie Henley W&I Program Analyst
- Shanita Thornton W&I Program Analyst

Quorum

A quorum was met.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed everyone to the call. The visual portion of the meeting is shown by using WebEx. This system will be leaving and replaced by MS Teams. Additional information will be shared. An overview of the agenda was provided and the following DFO Report:

- April 19, 2022, beginning at 3:00 PM, EDT the Internal Communication Committee (ICC) will have their meeting. There will be a calendar invite sent to members
- April 21, 2022, beginning at 3:00 PM, EDT the Outreach Committee will have their scheduled monthly meeting. TAP National Vice Chair Eugene Lille is the lead for this committee
- April 28, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting. Referrals are sent to the Joint Committee for approval. The meeting is open to the public and lead by TAP National Chair, Martha Lewis. Members were encouraged to attend to get a clear overview of what goes on during the meetings
- Members were reminded to reach out to Conchata Holloway or Jimerson with any concerns or questions
- Patience is needed during the changes occurring in www.TAPSpace.org
- Members are able to complete the Activity Reports directly in the system by signing onto www.TAPSpace.org

National Office Report

Terrie English welcomed everyone to the call. She provided the following National Office Report:

- April 18, 2022, is Tax Filing Season deadline. Members were encouraged to file timely
- Thank you expressed to the CPAs, PAs and Tax Preparers who have worked tirelessly getting the Returns completed. Appreciation to the volunteers who worked the VITA sites was noted
- Reminder WebEx will be moving over to MS Teams. Training for the Staff will be done. There will be a five-minute survey sent to each member to determine which platform you work from. This will give the Staff an idea on how to roll it out because MS Teams does not work the same with all platforms. The Analysts are not having the issues with the system. Members' patience is requested as we go through the process

Chair Report

Leigh Ann Wood stated the Joint Committee's meeting will be held at the end of the month. Monday will be the last day to file Returns without extension.

Minutes Approval

TCC Minutes for March 30, 2022, were approved with correction. Wood motioned and Jim Buttonow seconded

Member of Public

N/A

Subcommittees Report

Subcommittee 1

Ruth Guyon stated

- **Issue 36435**, Penalty Relief Awareness First Time Abatement the Subcommittee submitted their recommendations in 2021. There were five recommendations received and one rejection, They agreed to submit a rebuttal for ID 2135
- **Issue 40485**, IRS Tax Calendar was reviewed and a SME has been requested to attend the next Subcommittee meeting
- **Issue 54248**, Maximizing Outreach for Benefits a SME has been requested to attend the next subcommittee meeting

Subcommittee 2

Jim Buttonow stated Subcommittee 2 had four Issues. The first Issue the subcommittee agreed to close and the last three were legacy issues.

- **Issue 43838**, Proving Awareness of Third-Party Authorization has one open recommendation. IRS rejected this recommendation. Subcommittee 2 agreed to close this issue agreeing to disagree. Buttonow motioned and Hercules Analitis seconded

Decision: Full Committee Consensus to close Issue 43838

- **Issue 43684**, Status of Amended Tax Returns questions were submitted to IRS, SME questions were shared in the summary. Holloway stated there were no additional questions. She will forward to Martinez. Buttonow added there were four recommendations to address the Issue. Discussions will be held during the next subcommittee meeting
- **Issue 41768**, Taxpayer and Tax Professionals Online Accounts is from TAP year 2020. IRS rejected this issue. Subcommittee agreed to discuss this issue during next month's meeting
- **Issue 54250**, Increase Electronic Filing of Forms>Returns will discuss during next month's meeting

Outreach

Vice Chair, Victoria Ramirez stated the Outreach committee did not have their meeting for the month of April

- Members were encouraged to continue to try and do Outreach
- Continue to complete their Activity Reports on www.TAPSpace.org
Members needed assistance should contact Holloway or Wood

Internal Communications Committee (ICC)

Buttonow stated the ICC meeting is scheduled for April 19, 2022. An article was put together summarizing the Issues and status. If members have any updates should forward to Buttonow. Matthew O'Sullivan will share with members the final Newsletter

Action Items

Holloway shared the following Action items:

- A reminder of the following upcoming meetings: ICC on April 19, 2022; Outreach on April 21, 2022, both at 3:00 PM, EDT and the Joint Committee on April 28, 2022, at 1:30 PM, EDT
- Forward TCC March 30, 2022 approved minutes to Kevin Brown for posting
- Close **Issue #43838** as accepted IRS response
- Buttonow and Ramirez will prepare the article for the Newsletter are due by the twenty-fifth of each month and a copy to Holloway and TaxpayerAdvocacyPanel@irs.gov
- Reminder an Email message will be sent to members to ensure they are connected on MS Teams
- Send invite to SMEs for Subcommittees meeting
- Members needing assistance were encouraged to reach out to Holloway

Roundtable

Wood informed members having comments, questions or concerns to take the opportunity to share

- Richard Bell asked if there is an official process in submitting an Issue. Jimerson informed Bell to forward the Issue to Holloway and she will enter into the system to be screened
- Ruth Guyon asked where to send questions. Jimerson stated questions should be sent to the mentor for discussion and guidance
- Buttonow stated the committee is off to a great start. Members with question were advised to reach out to members who have been on the TAP for more than a year or two. He shared encouragement to members
- Joanne Thurston shared there are a lot of Returns she will be filing extensions for
- Wood suggested this could possibly be a new issue

English added there is a TAP member, Donna Patterson who has volunteered to assist with understanding and getting through MS Teams.

Jimerson encouraged members to visit www.TAPSpace.org and test completing the Activity Reports. Members were encouraged to keep track of their time and continue to be safe.

Close

Jimerson thanked members and the meeting was officially closed.

**Next Meeting: Wednesday, May 11, 2022
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.