

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, June 08, 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 |
| • Victoria Ramirez | Sacramento, CA | Vice Chair |
| • Candace Smith | Mustang, OK | Member |
| • Leigh Ann Wood | Columbia, SC | Chair |

Members Absent

- | | | |
|-----------------------|--------------|--------|
| • Ruth Guyon | Bellevue, NE | Member |
| • Jared Lefevre | Billings, MT | Member |
| • Tracey Randall-York | Ontario, CA | Member |
| • Joanne Thurston | Marietta, GA | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | W&I Program Analyst |

Quorum

A quorum was met.

Welcome and DFO Report

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

- June 15, 2022, the Ad Hoc Committee for the TAP Chairs will meet at 2:30PM, EDT
- June 16, 2022, beginning at 3:00PM, EDT the Outreach Committee will have their meeting. National TAP Vice Chair, Dr. Eugene Lillie is the lead

on this committee. The project committees' Vice Chairs will be in attendance

- June 22, 2022, beginning at 12:00PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting. The ICC works on the Facebook presence, the monthly Newsletter and other internal and external communications projects. Congratulations to Victoria Ramirez is the Vice Chair for ICC
- June 22, 2022, there will be a Wrap Up Mentorship meeting
- June 23, 2022, the beginning at 1:30PM, EDT the Joint Committee will have their monthly meeting. The committee is led by the National TAP Chair, Martha Lewis and attended by the Chairs. Members were encouraged to attend to get a clear overview of what goes on during the meetings. This meeting is opened to the public. Members were reminded to reach out to Conchata Holloway or Jimerson with any concerns or questions
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National Office

Terrie English welcomed members to the call and provided the following National Office updates:

- Members were informed to watch for emails being sent with information on the IRS Tax Forums. The Forums are scheduled to begin on July 19, 2022 and run through August 18, 2022. This is a form of Outreach. The Analyst will be reaching out to members to see if anyone would be interested in volunteering to man the virtual Tax booths. There will be training on working the booths. Members were encouraged to participate
- The first Quarterly meeting is scheduled for June 13, 2022. Members were encouraged to attend. The National Taxpayer Advocate, Erin Collins will be present to answer any questions. Members were encouraged to submit their questions to the analyst prior to the meeting
- English stressed referrals take time to work. A referral was submitted on last year and implemented recently.
- Members were encouraged to continue doing Outreach and send in referrals

Chair Report

Leigh Ann Wood provided the following Chair Report:

- Thank you was expressed to members who worked on Issue 40148, Multiple Year WMR project last year. IRS recently implemented it. There is an article posted on www.TAPSpace.org
- The Joint Committee's meeting will be held June 23, 2022 and members were encouraged to attend

- Activity Reports are now able to be entered directly in the system by signing onto www.TAPSpace.org
- Members are awarded a Presidential Award based on the number of hours volunteered. The award letter will be signed by the current president. Members received this award at the end of their third year
- Members were reminded how important reporting time benefits the TAP program

Minutes Approval

TCC Minutes for May 11, 2022, were approved with correction. Jim Buttonow made the motion and Hercules Analitis seconded

Member of Public

N/A

Subcommittees Report

Subcommittee 1

Candace Smith provided the following update for Subcommittee 1:

- **Issue 36435**, Penalty Relief Awareness First Time Abatement Subcommittee 1 reviewed the response provided by IRS. Wood recommended closing the issue and create a new issue to prioritize the Reasonable Cause concerns. Jim Buttonow seconded
Action: Holloway will assign the new issue number
Decision: Full Committee Consensus to close Issue 36435
- **Issue 40485**, IRS Tax Calendar, Smith stated IRS original purpose was to provide taxpayers access to the Tax Calendar with due dates and extension dates. Subcommittee1 discussed the issue and recommended closing the issue with additional research to follow up. Wood motioned to close and focus more on the online account features. Jim Buttonow seconded
Decision: Full Committee Consensus to close Issue 40485
- **Issue 54248**, Maximizing Outreach for Benefits Subcommittee 1 started to work on the referral. Follow up questions were submitted to the SMEs. They are waiting to receive the SMEs responses to begin working on the referral. Additional information will be shared during next month's meeting

Subcommittee 2

Buttonow shared the following updates for Subcommittee 2:

- **Issue 54250**, Increase Electronic Filing of Forms>Returns Subcommittee 2 met with the SMEs. Information was received on the advantages to E-Filing. Discussions were held on doing Outreach to encourage E-File rate and online adoption rate. They are waiting on responses to begin making their recommendation

Screening Committee

Buttonow shared the following updates:

- The Screening Committee had their meeting
- There were sixty issues on the report. Seventeen of them were new issues. They were divided into five groups:
 1. 1040X processing
 2. Using SSN on Correspondence Notices and sent to the Notices and Correspondence committee
 3. Recommendation on improving E-Filing using 1099 was sent to Tax Forms and Publications committee
 4. Email IRS with questions Subcommittee will work this issue
 5. Possible new issue ID.me authentication
- Sixty were new issues, forty-three were business as usual, four new issues on 1040X, Social Security numbers, E-Filing 1099 and two went to the other committees

Wood motioned to accept the Screening Committee's report and Buttonow seconded

Decision: Full Committee Consensus approve the Screening Committee's Report as submitted

Outreach

Victoria Ramirez shared the following Outreach report:

- The first Virtual Tax Forum is scheduled for the middle of July until the middle of August. Antonio Ross sent an Email to members asking for volunteers to assist with the virtual chat booths. Member responses are due by next week Friday, June 17, 2022
- There is a lot of material available for Outreach on the TAP portal using the Outreach Toolkit. Members were encouraged to read through the material for useful ideas

Internal Communications Committee (ICC)

Ramirez shared the following updates for ICC:

- Angela Madison is the Chair of ICC and Ramirez is the Vice Chair
- ICC is working on the TAP Newsletter, possibly change to the format/creative ways to improve consistency across the committees, and looking at possible updates to the TAP Handbook
- Members were advised the Facebook page is still in need of an Administrator. Members were encouraged to volunteer for the position
- Matthew O'Sullivan added he will remove Buttonow from the ICC. Buttonow will continue to be available to assist with the Newsletter

Action Items

Holloway shared the following Action items:

- Forward approved May 11, 2022, meeting minutes to Kevin Brown for posting
- Close Issue 36435 and provide additional research with the assignment of a new Issue number
- Close Issue 40845 and additional research for the online account with additional research and possible new Issue number
- Accept the Screening Report and close the issues on the database

Roundtable

Wood asked for any comments from members:

- Buttonow asked if more issues would be assigned, information in the IRS Databook will be shared with members. Holloway added it is posted in www.TAPSpace.org
- Smith asked if there were any technical skills required to participate in the Tax Forums. Jimerson informed the committee, there are no technical expertise needed. Members role is to talk about the mission of TAP and if they have any issues to submit

Close

Jimerson thanked members and the meeting was officially closed.

**Next Meeting: Wednesday, July 13, 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.