

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, May 11, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|------------------------|-----------------|------------|
| • Denise Besson | Trufant, MI | Member |
| • James “Jim” Buttonow | Summerfield, NC | Member |
| • Victoria Ramirez | Sacramento, CA | Vice Chair |
| • Tracey Randall-York | Ontario, CA | Member |
| • Candace Smith | Mustang, OK | Member |
| • Leigh Ann Wood | Columbia, SC | Chair |

Members Absent

- | | | |
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| • Hercules Analitis | Chicago, IL | Member |
| • Richard Bell | Corpus Christi, TX | Member |
| • Ruth Guyon | Bellevue, NE | Member |
| • Jared Lefevre | Billings, MT | Member |
| • Joanne Thurston | Marietta, GA | Member |

Visiting Member

- | | | |
|-----------------|----------------------|---------------------|
| • Martha Lewis | Colorado Springs, CO | National TAP Chair |
| • Eugene Lillie | West Deptford, NJ | National Vice Chair |

Staff

- | | |
|---------------------|------------------------------|
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Rosalind Matherne | 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:

- Members were encouraged to reach out to Conchata Holloway or Jimerson with any questions or concerns

- The Activity Reports submission process has been changed over to www.TAPSpace.org for members. The process is easier, and members were encouraged to submit any questions to Holloway or Jimerson
- May 18, 2022, the Ad Hoc Committee for the TAP Chairs will meet at 2:30 PM EDT. This meeting will include Martha Lewis the National TAP Chair, the Chairs of the project committees and ICC
- May 19, 2022, beginning at 12:00 PM, 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
- May 25, 2022, beginning at 12:00 PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting. The ICC works on the Facebook presence, monthly newsletter, and other internal and external communications projects
- May 26, 2022, the beginning at 1:30 PM, EDT 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
- May 30, 2022, TAP office will be officially closed in recognition of Memorial Day

National Office

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

- IRS Tax 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. Participation is expected from all members
- TAP 2023 Recruitment process has begun. Applicants have all gotten their applications completed. The application process takes time. Members will be receiving an email invite to volunteer in assisting with the interviews. Members were encouraged to participate and take advantage of the opportunity to find out what happens in the process. Information obtained would help in explaining to anyone interested in being a part of TAP
- Business cards will be ordered for new members and returning members who may need additional cards.
- ID Name Badges will be ordered for all new members
- June 13, 2022, beginning at 1:30 PM, EDT the TAP first quarterly meeting will be held. The National Taxpayer Advocate, Erin Collins will be

speaking during the meeting. More information will be shared closer to the date

Chair Report

Leigh Ann Wood provided the following Chair Report:

- The Joint Committee met on last week. Discussions were on www.TAPSpace.org and entering the Activity reports, area on where to write or update accomplishments into the biography
- Members were encouraged to reach out to Holloway, Jimerson or Wood with questions or concerns
- National TAP Chair, Martha Lewis thanked everyone for allowing her to sit in on the meeting and she is looking forward to the work the committee is doing

Minutes Approval

TCC Minutes for April 13, 2022, were approved with correction. Wood motioned and Jim Buttonow seconded

Member of Public

N/A

Subcommittees Report

Subcommittee 1

Wood provided the following update for Subcommittee 1:

- **Issue 54248**, Maximizing Outreach for Benefits Subcommittee 1 had a SME present at their meeting to speak about this issue. There were a few questions sent back to the SME. Members were encouraged to share any questions they may have, presentations or if they need clarification on anything Holloway will share with the SME prior to meeting
- Members were asked to share ideas to assist with Outreach, Tax credits, underserved communities, and how to get the information out to areas. Suggestions or questions were asked to be forwarded to Holloway and the Outreach Committee for their ideas
- Subcommittee 1 had two other topics they were unable to get to. The SME has been invited to attend their next meeting to answer questions on the IRS Tax calendar

Subcommittee 2

Jim Buttonow shared the following updates for Subcommittee 2:

- **Issue 41768**, Taxpayer and Tax Professionals Online Accounts the subcommittee had two recommendations. After discussions, Subcommittee 2 recommended closing this issue and look for another opportunity leading to address the prioritization resource issue
Buttonow motioned and Wood seconded

Decision: Full Committee Consensus to close issue 41768

- **Issue 54250**, Increase Electronic Filing of Forms>Returns Subcommittee 2 is working this issue. Questions were sent to IRS. Discussion will be held during next month's meeting with the Full Committee. Members with questions were advised to reach out to the members of Subcommittee 2
- There are other issues the subcommittee is waiting for SMEs on Issue 43684, the status of amended returns
- They are waiting on the Screening Committee for additional issues

Screening Committee

Buttonow shared the following updates:

- The Screening Committee had their first meeting on Friday
- A copy of the Screening Report was posted in the Pre-reads on www.TAPSpace.org members were advised to read over the report
- Over three hundred issues are in their inventory
- They addressed ninety issues with common threads; unable to get a hold of IRS, slow IRS processing, need account information. Some will be pushed forward.
- The committee agreed to meet again on May 20, 2022, beginning at 12:30PM, EDT
- Members were encouraged to attend and join the Screening Committee's meeting

Buttonow motioned and Victoria Ramirez seconded

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

Outreach

Victoria Ramirez stated the Outreach committee had their meeting

- Members were encouraged to continue to look for issues
- Speak to members of their communities and continue to talk with people
- Ramirez added she reached out to her LTA in CA
- Members were encouraged to reach out to their LTA for future events
- Ramirez did a presentation on how to enter hours on the Activity Reports spreadsheet within www.TAPSpace.org
- English thanked Ramirez for a job well done on the presentation

Internal Communications Committee (ICC)

Ramirez shared the following updates for ICC:

- Matthew O'Sullivan stated the Vice Chair is Acting Chair until the Chair position will be filled during their next meeting on May 25, 2022.
- ICC looks at refreshing Facebook, Taxpayers complaints on line and the TAPSpace manual

Action Items

Holloway shared the following Action items:

- Reach out to members needing Business cards to submit request by COB on Thursday, May 12, 2022.
- Send reminder to members Activity Reports are due by the twenty-fifth of each month
- Send reminder to members to update their biography in www.TAPSpace.org
- Close Issue 41768 and close issues from the Screening Report not worked
- Send reminder to SMEs for subcommittee meetings next month
- Send reminder to members to continue submitting questions
- Buttonow will submit the Newsletter article for the month. Members were encouraged to forward any items to be placed in the Newsletter
- Forward TCC April 13, 2022, approved minutes to Kevin Brown for posting

Roundtable

Wood asked for any comments from members:

- Buttonow asked for further explanation of what is going on with the Ad Hoc Committee and if there were any input he could provide
- Martha Lewis stated the Ad Hoc Committee meetings were just for the Chairs. It is training for the Chairs. They discuss several topics including Outreach, conducting committee meetings, TAPSpace and members could talk with their Chairs to find out what is happening. Lewis confirmed to add Buttonow's concern to the June meeting on how to coordinate which issues to pursue by committees
- Ramirez added would the Vice Chairs be able to attend the Ad Hoc Committee. Lewis was not opposed to the idea but wanted to speak with the Chairs and get back with members by the end of the year
- Buttonow asked if Holloway would share information he provided on Free Filing to members. Holloway agreed to share the information with the staff and members

Michael Odom shared the following information:

- No open referrals, reconsideration checks or implementation checks
- Anticipating referrals from the members working the Outreach information submitted
- June 01, 2022, reminder Robert Anmuszewski will be speaking to the committee members on increased Electronic Filing

English added this was a great meeting. She will reach out to Lewis for discussion on Ramirez's inquiry.

Close

Jimerson thanked members and the meeting was officially closed.

**Next Meeting: Wednesday, June 08, 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.