



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 12, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Members Present

- | | | |
|---------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy R. Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Tamikio Bohler | Wage & Investment |
| • Michael Odom | Wage & Investment |
| • Cindy Jones | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. Terrie English was not able to attend the call. The following upcoming meetings were shared:

- Quarterly Virtual TAP meeting will be held on August 17, 2020 beginning at 1:00 p.m. ET. There will be virtual training and information shared on the current events happening within the TAP program.
- The Outreach Committee meeting will be held on August 20, 2020 beginning at 12:00 p.m. ET
- The Annual Planning Session for the Joint Committee (JC) will meet on August 24, 2020. The Chairs of the Project Committees will all attend the session. They will review how the year has gone, the different projects for the upcoming year, discuss the presentative for the Chair and different items involving TAP. There will be two days of two-hour sessions on each day. The first session will be held on August 25, 2020 and the other one on August 26, 2020. They both will begin at 1:30 p.m. ET
- The Joint Committee monthly meeting will be held on August 27, 2020 beginning at 1:30 p.m. ET



- A solicitation was sent out to each member asking for volunteers to participate on the 2020 Annual Report Committee. Members who did not receive the email were encouraged to contact Gilbert Martinez, the Joint Committee Analyst to let him know. He will be responsible for facilitating the meetings in a timely manner.
- Internal Communications Committee (ICC) meeting is scheduled for August 25, 2020. They will work to reschedule the meeting due to a conflict with the JC Planning Session. Matthew O'Sullivan is the Analyst for ICC and will be responsible for rescheduling the meeting
- There are three meetings remaining for the TAP year. Appreciation was expressed to members for their commitment and work being done.
- Jimerson then gave an overview of the Agenda.

Chair Report

Andrea Price welcomed everyone to the call. She expressed thank you to Bernard Peterson for taking the Lead on Subcommittee 1 and to Joseph Edelen for providing the Committee's Newsletter article for August

- Joint Committee will have their Planning Session on August 25, 2020 and August 26, 2020. Price will be attending the meeting
- The Joint Committee met on July 23, 2020. Two of the six committees had referrals for approval by the Joint Committee
- Tax Forms and Publications had five referrals for approval
- Notices and Correspondence submitted four referrals for approval
- Price participated in the Taxpayer First Act Forum on July 16, 2020. It was conducted by the Internal Revenue Service Taxpayer First Act Office.

Three areas of focus:

Taxpayers Experience Strategy, IRS plans to educate Taxpayers by providing information in language. The method Taxpayers prefer. They will improve online web live chat and employees will be trained on for navigation support and expand their platform to Taxpayers who prefer online services or self-services. There will be improvement to the live web chat, for telephone employees to be trained on. This will involve concierge and navigation support for live interaction

Employee Training Strategy, IRS will establish an IRS University to have centralized learning for their employees with some of the latest technology in training curriculum and activities. They will establish a skill and competency assessment. This will help with the workflow planning and hiring efforts.

Organization Redesign Strategy, IRS will provide structure to enable IRS to not only support the Taxpayers experience strategy but the training strategy. They will look at some of the best practices of other industries for possible redesign, compliance processing, more efficient in operations and more specific in the outcome when resolving Taxpayers' compliance issues

- Price attended a second Ohio Stakeholders Liaison Virtual Outreach on July 23, 2020. She provided TAP with the updates.



Minutes Approval

July 8, 2020 TFPL Minutes were approved as submitted

Public Comments

None

Screening Report

There was no Screening Report for this call.

Subcommittees Report

Subcommittee 1

Bernard Peterson stated Subcommittee 1 held their meeting on August 6, 2020. Joseph Edelen and Lacy Rice attended the meeting. The following issues were discussed:

- **Issue 41423 Tax Practitioners' Toll Free Lines and Abilities of Support Staff.** Subcommittee 1 has been working on this issue for a couple of months. It involves CSR training and the inability to answer complicated questions. Debby Awalt provided information on how data is captured and shared. Subcommittee 1 decided to close this issue
- The subcommittee wants to look at responses to surveys for systemic issues.

Decision: Full Committee Consensus to close Issue 41423

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 forwarded the following two referrals for Quality Review:

- **Issue 43095 "Go Back" Options.** A proposal to add a "go back" feature to the Internal Revenue Service (IRS) Toll-Free 1040 phone line. The feature will permit a taxpayer to be able to go back to the previous phone prompt or the main menu. The subcommittee will make the minor changes suggested by the Quality Review (QR) team and will discuss this issue at the next subcommittee meeting.
- **Issue 43463 Area Code Added to Voice Response Unit (VRU).** A proposal to restructure the VRU on IRS' 1040 toll free phone lines to

communicate IRS' normal business hours are based on the area code of the taxpayer's telephone. The QR team reviewed the proposal and didn't make any comments. This issue will be discussed at the next subcommittee meeting.

Pinkney stated Subcommittee 2 is also working on the following two issues:

- **Issue 41899 Contacting the IRS – Call Flow Navigation Guide.** The subcommittee looked at the tax practitioner priority telephone menu on IRS.Gov. It was agreed that something similar should be listed for the 1040 toll free telephone line and perhaps all IRS toll free telephone lines. Phil Kleiber agreed to research and write this proposal.
- **Issue 43501 Out of Scope Telephone Assistors Will Not Answer.** The subcommittee reviewed the IRS website and determined that the "Let Us Help You" page (specifically the list of "topics our assistors can't



address”), needs to be rearranged and given a more prominent position on the website’s home and landing pages. Andrea Price agreed to research and write this proposal.

Outreach

Lacy Rice, Jr. stated that for the month of July the Outreach Committee had a total of:

- 13.6 Outreach hours
- 66,207 people reached
- 110.9 overall activity hours
- The Outreach Committee has been working on the TAPSpace Toolkit, which is almost ready to be used. Members were encouraged to visit TAPSpace and familiarize themselves with the features.
- A Media Guide is also on TAPSpace which is a good resource to use for Outreach when dealing with the media.
- A reminder that Activity reports are due on the twenty-fifth of the month and to forward copies of the report to Rice, Matherne and the TaxpayerAdvocacyPanel@irs.gov.
- Members were encouraged to conduct virtual Outreach.

Internal Communications Committee (ICC)

Joseph Edelen stated ICC met on July 28, 2020 and shared the following:

- The committee discussed the need to finalize the 2020 Annual Report by the end of the year
- Leonard Smith volunteered to work on the September Newsletter and Nina Tross volunteered to work on the October Newsletter.
- Phillip Kleiber stated that he received a response from Terrie English that the use of Zoom is not approved by IRS to use by TAP. The Full Committee had a brief discussion on this issue.

Action Items

Rosalind Matherne stated she will

- Send out the Pre-reads to each subcommittee before the next month’s meeting.
- Send a calendar invite for the next Screening Committee meeting scheduled for August 25, 2020 at 12:00 PM EDT
- Close **Issue 41423** on SAMS

Jimerson expressed appreciation to members for attending today’s meeting. Also, if members have any questions, please reach out to Jimerson or Matherne. Members were encouraged to stay safe.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, September 9, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**