



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 8, 2020**

**Designated Federal Officer**

- Susan Jimerson                      Chief TAP West

**Members Present**

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

**Members Absent**

- |                  |                |        |
|------------------|----------------|--------|
| • Terrill Flakes | Waynesboro, GA | Member |
|------------------|----------------|--------|

**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:

- Outreach Committee meeting is scheduled for 12:30 p.m. ET on July 16, 2020
- The Virtual Tax Forums are approaching. Fred Smith sent a notification to members with information and requested members to participate if they are interested. He will need members to respond by July 9, 2020
- The Joint Committee's meeting is scheduled for 1:30 – 3:00 p.m. ET on July 23, 2020. It is led by Phillip Kleiber, National TAP Chair. Robert Moretti TAP Vice Chair and the Chairs of the Project Committees will be attending. Committee members are encouraged to attend the meeting to get a better understanding of how decisions are made on the referrals going forward to the IRS



- The Internal Communications Committee (ICC) is scheduled for 3:00 p.m. ET on July 28, 2020. The ICC is responsible for the TAP Newsletter, TAP Facebook page information and social media
- Overview of the Agenda was shared

Phillip Kleiber added that the Project Committee Chairs were invited to the Taxpayer First Act Forum on July 16, 2020. He anticipates possible issues will be brought to the attention of TAP.

### **Chair Report**

Andrea Price welcomed everyone to the call. The Subcommittees met on July 2, 2020.

- Price thanked Joe Edelen and Bernard Peterson for their TFPL representation on the ICC. Price also thanked Cynthia Pinkney for accepting the position as Subcommittee 2's Lead
- Price noted that Terrill Flakes could not attend today's meeting
- The Joint Committee met on June 25, 2020. The following committee referrals were approved to move forward to the IRS: Tax Forms and Publications (TFP) submitted seven, Notices and Correspondence Committee submitted four, ICC submitted one on upgrading of [www.TAPSpace.org](http://www.TAPSpace.org) website and Special projects submitted one
- Price stated that Terrie English shared information that the Taxpayer First Act Forum will meet with the TAP Committee Chairs on July 16, 2020. The Vice Chair will attend only if the TAP Chair is unavailable

### **Minutes Approval**

June 10, 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 met on July 2, 2020. Joseph Edelen and Lacy Rice attended the meeting. Price attended the meeting as the TFPL Committee Chair. The following issues were discussed:

- **Issue 40558**, the subcommittee reviewed the response received from the IRS. The IRS did not adopt the reconsideration and Subcommittee 1 decided to accept the IRS response and close this issue
- **Issue 41423**, is a combination of two issues from the Parking Lot. Subcommittee 1 is researching this issue and is still working on it.

Price added that issues raised in Issue 41423 are discussed in detail in the 2017 and 2018 NTA's Annual Report to Congress under the Most Serious Problems.



## **Subcommittee 2**

Cynthia Pinkney stated Subcommittee 2 met on July 2, 2020. The following issues were discussed:

- **Issue 43095**, the subcommittee is researching the possibility of adding a feature on the 1040 phone line to allow taxpayers to return to the previous prompt or return to the main menu instead of having to call back and start all over again.
- The subcommittee is also researching the need to clarify the difference between calling the practitioners' line and the business tax prompt on the 1040 phone line. In addition, the subcommittee is also looking into clarifying the IRS business hours by explaining that a taxpayer will reach an office based on their telephone's area code.

## **Outreach**

Lacy Rice stated the following totals regarding TFPL's Outreach activity:

- 15 Outreach hours
- 38,074 people reached
- 109 overall activity hours
- Appreciation was expressed to members for doing a much better job at getting their activity reports turned in
- The next Activity Reports are due on July 25, 2020.
- During the Outreach Committee meeting, the Chair asked for members' feedback describing their Outreach activities. Price gave an overview in May and Kleiber did it for the month of June
- Various ways to conduct Outreach was shared to help spread the word about TAP by using social media, articles, press releases, etc. Members were encouraged to use some of the ideas to conduct their Outreach.
- One project worked on by the Outreach Committee was the Toolbox. Committee members were assigned different items in the Toolbox to review and provide recommendations. Members were encouraged not to access the Archives and 2020 folders while visiting the Toolbox Outreach area on [www.TAPSpace.org](http://www.TAPSpace.org) Those folders are being worked on. The other folders are available to be utilized
- Cedric Jeans provided an article describing what is being done in Outreach. He suggested using the Media Guide as a helpful tool for Outreach ideas
- Members were encouraged to share any ideas they have for Outreach
- Members were sent the LTA list by Matherne. Rice encouraged members to reach out to their LTA for possible events for Outreach
- Jimerson informed the members that a social media guide is currently being developed by ICC which the Joint Committee will review and finalize. It has a lot of information on conducting Outreach. Once completed it will be shared with members.
- Committee members were encouraged to join the TAP Facebook group. The Facebook group may be converted to a Facebook page sometime in the future



Kleiber shared information about press releases which members could use as an Outreach opportunity. He shared his press release with his local CPA Association who published it in their newsletter. Committee members can find the template on TAPSpace.org in the 2020 folder of the Outreach Toolbox. Price agreed this was a great way to share information about TAP.

### **Internal Communications Committee**

Joseph Edelen provided an update for the ICC meeting he attended:

- **Issue 43192**, referral was discussed regarding the redesign of [www.TAPSpace.org](http://www.TAPSpace.org)
- There was discussion regarding converting the Facebook group to a Facebook page.
- Committee members were encouraged to submit ideas and suggestions for the TFPL article. The articles are due by the 25<sup>th</sup> of the month.

Price thanked Edelen for submitting the ICC newsletter article and suggested that the due date be changed from the 25<sup>th</sup> of the month to a later date since the Outreach activity reports are due on the same day. The DFO explained the reasoning behind this.

### **Action Items**

Rosalind Matherne stated she will:

- Assign the issue number to the Area Code issue to be submitted as a new referral for reconsideration
- Research and pursue questions for both Subcommittees

Jimerson expressed appreciation to the committee members for all the work being done and encouraged everyone to remain safe and continue to do Outreach.

### **Close**

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, August 12, 2020,  
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**

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