



**Toll Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 10, 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 Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Terrie English | TAP Director |
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Debra Awalt | Wage & Investment |
| • Tamikio Bohler | Wage & Investment |
| • Michael Odom | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. Two committee members have resigned: Richard Brouillard from Wisconsin and Thomas Kerr from New York. Donna Burris from New York has been added to TFPL Committee. The following upcoming meetings were shared:

- The Outreach Committee meeting is scheduled for 12:00 p.m. ET on June 18, 2020. Robert Moretti, TAP Vice Chair and all Project Committee Vice Chairs should attend.
- All TAP Virtual Meeting is scheduled for 2:30 p.m. ET on June 18, 2020. The National Taxpayer Advocate is scheduled to speak at this meeting
- The Internal Communications Committee (ICC) is scheduled for 3:00 p.m. ET on June 23, 2020. The ICC works on the TAP Newsletter and TAP's Facebook page
- The Joint Committee is scheduled for 1:30 p.m. ET on June 25, 2020 led by Phillip Kleiber, National TAP Chair. Robert Moretti, TAP Vice Chair and



Chairs of the Project Committees should be in attendance. Committee members are encouraged to attend the meeting

- The interview phase of TAP's recruitment efforts has begun and anticipated ending at the end of June.
- Overview of the Agenda was shared.

National Office Report

Terrie English welcomed everyone to the call and shared the following:

- Some of IRS offices are opening and updated information is being provided daily on www.IRS.gov website. A lot of the call centers are also opening. Information will be shared as it become available
- TAP member business cards and ID badges have been ordered. Due to office closures, they are unable to be mailed to members. Kevin Brown will forward them to each member once the staff is able to return to the office
- TAX Forums will be held virtually this year. Information on how TAP will be integrated into the process will be shared as soon as it becomes available
- On June 18, 2020 there will be an All TAP Virtual Meeting where training will be provided for members. Erin Collins, The National Taxpayer Advocate will be on the call. She will have a questions and answers session for members interaction
- Members are encouraged to attend the Joint Committee monthly meeting scheduled for June 25, 2020. It will be a great opportunity for New Members to learn what goes on during the Joint Committee meetings.
- TAP Interviews are moving forward

Chair Report

Andrea Price welcomed everyone to the call.

- Regretfully TFPL had two members resign from TAP. Richard Brouillard represented Wisconsin and Thomas Kerr represented New York
- Donna Burris joined the Committee and is on the call today. Burris represents the State of New York. Burris introduced herself to the Committee by sharing some of her background information
- Acknowledgement and appreciation to Joe Edelen and Bernard Peterson for their representation on the Internal Communications Committee for the TFPL Committee. Thank you to Cynthia Pinkney for taking the Lead for Subcommittee 2

Minutes Approval

The following May 13, 2020 TFPL Minutes were approved as submitted

Public Comments

None

Screening Report

Price stated the Screening Report Committee met May 26, 2020. Three members were present on the call. A copy of the report was shared with the Full Committee prior to this call. There were four issues:



Issues **Dropped**

- **42027**, a Legislative issue (Taxpayer wanted to submit Tax Return on www.IRS.gov website)
- **42166**, individual issue (Taxpayer attempting to contact someone related to their 2016 Tax Return)

Two **Parking Lot** Issues

- **41423**, Tax Practitioners' Toll-Free Line
- **43008**, Tax lines #800

Remaining Issues were assigned to Subcommittee 1 and Subcommittee 2. All calls related to customer service issues would be consolidated into one. The Screening committee will drop the issue on individuals within correctional facilities having limited and no internet access to prepare their taxes.

Decision: Full Committee Consensus accept Screening Committee's report as presented.

Subcommittees Report

Subcommittee 1

Terrill Flakes stated Subcommittee 1 had their meeting on June 04, 2020. They discussed four Issues:

- **42215**, difficulty reaching by phone. **Drop**
- **42072**, support staff issue. **Drop**
- **43008**, TAC Line 800 phone number. This issue was placed in the Parking Lot
- **43094**, Hold Time clock website on www.IRS.gov issue to be worked

Phil Kleiber added the Subcommittee will follow up on the response of wait times information is updated on www.IRS.gov with a generic message.

Subcommittee 2

Pinkney shared Subcommittee 2 updates for the following Issues:

- **42231**, a meeting will be scheduled for next week to work on the proposal
- **43095**, deals with the 1040 line structure. They are looking at the top four prompts on the phone call and waiting for information from Tamikio Bohler
- **43096**, involves providing toll free service to Taxpayers living overseas. This issue is being moved to Special Projects Committee to work
- **40707**, involves improved access for International Taxpayers. Subcommittee 2 recommendation is to accept IRS response and close this issue

Outreach

Lacy Rice stated the Outreach Committee met recently and Price was on the call. She shared highlights on her Outreach activities with suggestions. Kudos to Price who received recognition from the Outreach Chair.

- Thomas Kerr reached 2.9 million people
- 4.2 hours and Rice has participated in an interview session. The applicant's comfort level was discussed on doing Outreach
- 13.3 total hours of Outreach
- 3,001,572 total Outreach



- 111.9 participation hours
- Rice utilized LinkedIn for Outreach and encouraged members to use social media. He will put a resource list together and share with members. Burris suggested adding a link on individual websites for the questions and answers.

Internal Communications Committee

Jimerson is the oversight Manager for ICC and shared the following information:

- One of the responsibilities of ICC is to publish the TAP Newsletter containing articles from each project committee.
- Articles should be submitted to the ICC Analyst, Matthew O'Sullivan.
- The goal is to have all articles submitted by the 25th of the month. The Newsletter is distributed by the 5th of the following month
- Timeliness submitting articles is appreciated

Action Items

Rosalind Matherne stated she will

- Research hold times for Subcommittee 2 regarding **Issue 42231**
- Schedule another Subcommittee 2 meeting regarding **Issue 43095**. Research available call volume information.
- Schedule a meeting with Awalt and Jimerson regarding **Issue 42215** to determine if it a systemic issue

Close

Jimerson thanked everyone and officially closed the meeting.

**Next Meeting: Wednesday, July 8, 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.