



**Toll Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, February 10, 2021**

Designated Federal Officer

- Terrie English TAP Director

Attendance

- Donna Burris Brooklyn, NY Member
- Joseph Edelen Vermillion, SD Member
- Pamela Memmer Princeton, OH Vice Chair
- Cynthia Pinkney Tyler, TX Member
- Andrea Price Sylvania, OH Member
- Lacy Rice, Jr. Corpus Christi, TX Chair
- Ying Sa Des Moines, IA Member
- April Smith Birmingham, AL Member
- Rene Tiongquico Washington, DC Member
- John Yoon Carlsbad, CA Member

Visiting Member

- Bob Moretti Great Falls, MT TAP Chair

Staff

- Rosalind Matherne TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Annie Gold TAP West Administrative Assistant
- Michael Odom Wage & Investment (W&I), Operation Support
- Dale Hawkins W&I, Operation Support
- Debra Awalt W&I, Customer Account Services (CAS)

Absent

- Susan Jimerson Chief, TAP West

Members of the Public

None

Welcome

Terrie English opened the meeting and welcomed everyone to the call. Susan Jimerson could not be on the call. She shared an overview of the Agenda.

Members and Staff Introductions

Rosalind Matherne opened the floor with introductions. Each member and staff provided a brief information biography about themselves.

TAP Meeting Procedures

Matherne shared the following:

Ground Rules

- Ideas and Opinions are encouraged and valued
- Listen and allow each member to speak and be heard
- Time - Be respectful of each other's time and be punctual for meetings.
Please let the Chair and Analyst know if you're not able to attend meetings

Methods of Communications

- Emails
 - Send a copy of all project-related work to the Taxpayeradvocacypanel@irs.gov
- Telephone
- Fax
- WebEx
- Do not get discouraged if the responses received are not what you expected
- Do not "reply to all" or copy everyone unless it is necessary
- Always be considerate of others' time and feelings
- Remember to add information in the "Subject line:"
- Arrive 5 minutes prior to calls
- Identify yourself
- No sidebar conversations
- Mute telephone lines
- Participate

Meetings

- Agendas are shared with the Chair, Analyst and Designated Federal Officer (DFO) and then with the committee members. The Analyst will draft the Agendas and discuss it with the Chair, Vice Chair and DFO for approval before it's distributed to the committee members.

- Pre-Reads are shared prior to meetings and should be reviewed before the meetings
- Quorum must be met (50% plus 1) to make decisions and approve documents
 - Full Committee meetings are subject to Quorum whereas Subcommittee and Screening Committee meetings are not

WebEx

- Visual portion
- Meetings held via conference calls
- Able to share documents
- English added that Zoom will be used on a limited basis because TAP was allotted only one license

The following are useful tools to research issues and for document retrieval:

www.TAPSpace.org, www.Improveirs.org and www.IRS.gov.

So You Want To Be A Chair

Matherne and Bob Moretti, who is the TAP Chair, shared an overview of the duties and responsibilities of the Committee Chair and Vice Chair:

- The Chair is elected by the membership
- Bob Moretti is the current TAP Chair. His duties include being the spokesperson for TAP and point of contact for the Joint Committee to ensure understanding of issues and their background
- Nina Tross is the current TAP Vice Chair and leads the TAP Outreach Committee

Congratulations

- **Lacy Rice self-nominated and was unopposed. Lacy accepted the position as the TFPL Committee Chair**
- **Pamela Memmer self-nominated and unopposed. Pamela accepted the position as the TFPL Committee Vice Chair**

Order of Business

Minutes Approval

November 12, 2020 TFPL Minutes approved with corrections.

Committees and Meeting Dates

Subcommittee 1: Donna Burris, Joe Edelen, Andrea Price, April Smith and Ying Sa (Lead)

Meetings will be held on the first Tuesday of the month beginning at 1:00 PM, EDT

Subcommittee 2: Pamela Memmer, Rene Tiongquico, Lacy Rice, John Yoon and Cynthia Pinkney (Lead).

Meetings will be held on the first Wednesday of the month beginning at 12:00 PM, EDT

TFPL Full Committee will be held the second Tuesday of the month beginning at 11:00 AM, EDT

Outreach Committee: Vice Chair, Memmer will be on the Outreach Committee. Rice will be the back-up

Screening Committee: Price, Burris and Memmer volunteered to work on this committee.

Quality Review Committee: Members from one subcommittee will do the Quality Review for the other subcommittee.

Internal Communications Committee (ICC): Tiongquico and Pinkney volunteered to work on this committee. Pinkney will be the back-up.

IRS Responses

Matherne shared a summary of the IRS responses received, as follows:

- Two Issues have been accepted for consideration by the Internal Revenue Service (IRS):
 - **Issue #41899** *Navigation Guide*
 - **Issue #43095** *Go Back Options*
- Three issues have not been adopted by the IRS at this time:
 - **Issue # 43632** *Reposition Foreign Language Prompts on the 1040 Line*
 - **Issue #43463** *Area Code Added to Voice Response Unit*
 - **Issue #42231** *IRS Telephone Number should be listed on 1040 Instructions*

The subcommittees will decide whether to accept or rebut the above issues.

IRS has asked the TFPL Committee to assist them with three projects:

- **Issue #44243** *Expansion of Customer Call back to eleven additional applications*
- **Issue #44245** *Natural Language Pilot on the Economic Impact Payment (EIP) Phone Line*
- **Issue #44246** *Natural Language Telephone Assistance*

There will be a Screening Committee meeting in April 2021.

Action Items

Matherne shared the following Action items:

- Post TFPL approved November 12, 2021 Minutes
- Forward calendar invites and pre-reads to the committee members

Rice thanked everyone for being on the call. He stressed the importance of maintaining 100% participation in submitting monthly Activity Reports.

Close

English officially closed the meeting.

**Next Meeting: Tuesday, March 9, 2021
11:00 AM ET, 10:00 AM CT, 9:00 AM MT, 8:00 AM PT**

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