

2012 Meeting Minutes Toll-Free

- November 6, 2012
- October 2, 2012
- September 4, 2012
- August 7, 2012
- July 3, 2012
- June 5 – 6, 2012
- May 1, 2012
- April 3, 2012
- March 6, 2012
- February 7, 2012
- January 3, 2012

Taxpayer Advocacy Panel (TAP) Toll-Free Project Committee November 6, 2012

Designated Federal Official (DFO)

- Lacrishea McClendon

Members Present

- Armstrong, Ken
- Fishman, Annie
- Hitchcock, Colleen - Chair
- Kalimeris, Angeliki
- Lees, Rodger
- Wells, Gary
- Zachary, Martha

Members Absent

- Marshalek, Mark

Program Owners

- Momon-Townsend, Deborah – Wage and Investment
- Awalt, Debra – Wage and Investment

TAP Staff Present

- Dominguez, Marianne – Program Analyst
- Morizio, Louis – Program Analyst
- Todaro, Tiffany – TAP Director (Acting)

TAS Staff

- Szargowicz, Lisa
- Birts, Tamara

Public Participants

- None

Welcome/Announcements

Hitchcock welcomed everyone to the call. The minutes for September were approved for posting.

Chair Report

Hitchcock provided an update to members on the Face to Face Meeting, December 3 through 7. She stated the following:

- Jacksonville/Plantation, FL, and Oakland, CA have been the final cities chosen for the face to face meetings.
- On December 5, there will be a combined meeting covering training sessions for all members. This training will occur simultaneously in all three meeting locations.
- The election process has begun; members are encouraged to select their choice for TAP Chair and Vice Chair positions.

TAP Manager Report

Morizio provided an update on TAP recruitment. He stated that the names were submitted to the National Taxpayer Advocate, Nina Olson. Subsequent to Olson's review, the package will be sent to the Assistant Secretary for Committee Management. Members and applicants will be notified when the final selections are made.

DFO Report

McClendon did not have anything new to report but stated that she enjoyed working with TAP as the DFO. Morizio thanked McClendon for her work with the TAP members.

Portfolio Advisor Report

Szargowicz stated the following:

As of October 1, the Centralized Authorization File unit will cease its operation. Taxpayers will be provided a recorded message to call 1-800-829-1040 for individual accounts and, 1-800-829-4913 for POA/Tax Information Authorization accounts assistance.

Systemic Advocacy Updates

Birts was not present for the meeting, but provided an update through TAP Analyst Dominguez:

Systemic Advocacy Report

- 1) SA has a newly created task force on transcript issues. The taskforce is going to look at the various problems taxpayers experience when trying to obtain transcripts. This includes issues such as non-receipt of a transcript, how to get information when someone is a victim of identity theft, providing information during the financial aid crush for college students as well as how to get funding to pay for systems upgrades. The taskforce will be cross functional so we can work with all IRS functions that have anything to do with transcripts.
- 2) Annual Report to Congress Update: Currently there are 26 Most Serious Problems (MSP), 8 Status Updates (SU), 10 Most Litigated Issues (MLI) and 9 Legislative Recommendations (LR). All of the first drafts should be turned in this month and the IRS will have an opportunity to respond prior to anything going to print. There is always the possibility some of the MSPs will be dropped, and this usually occurs when the IRS or Congress make changes that make the item no longer an MSP.

Subcommittee Report Out

Team A

Dominguez reported for Kalimeris who was absent. Team A has drafted two recommendations. Lees has reviewed them and provided feedback on some modifications. There will be further discussions on the recommendations at the next subcommittee teleconference next week.

Team B

Armstrong's subcommittee has finished all their projects. Lees is now reviewing the referrals and will suggest modifications if necessary. There will be further discussions on the recommendations at the next subcommittee teleconference next week.

Outreach Report

Fields presented her outreach numbers for the month of August. There were 4 outreach events with an audience of 485.

Armstrong mentioned that there will be some training and more explanation on making outreach more interesting. Armstrong reminded members that outreach for September is now due.

Mentoring Program

Lees mentioned to the members that they should consider mentorship to new members.

Lees stated that he had a one on one session with a member who expressed interest in TAP leadership. Less said that he provided insight to enable the member to make to make a decision

**Comments**

None

Closing

Hitchcock and McClendon thanked all for joining the teleconference.

The next teleconference is scheduled for Tuesday, November 6, at 11 a.m. ET.



**Taxpayer Advocacy Panel (TAP)
Toll Free Project Committee
October 2, 2012**

Designated Federal Official (DFO)

- Lacrishea McClendon

Members Present

- Armstrong, Ken
- Fishman, Annie
- Hitchcock, Colleen – Chair
- Lees, Rodger
- Marshalek, Mark
- Wells, Gary
- Zachary, Martha

Members Absent

- Kalimeris, Angeliki

Program Owners

- Momon-Townsend, Deborah – Wage and Investment
- Sneed, Sherri – Wage and Investment

TAP Staff Present

- Babb, Rose A – Management Assistant
- Dominguez, Marianne – Program Analyst
- Fields, Anita – Program Analyst
- Morizio, Louis – Program Manager

TAS Staff

- Szargowicz, Lisa – Portfolio Advisor

Public Participants

None

Welcome / Announcements

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Comments

None

Closing

Hitchcock and McClendon thanked all for joining the teleconference.

The next teleconference is scheduled for Tuesday, November 6, at 11 a.m. ET.

**Taxpayer Advocacy Panel (TAP)
Toll Free Project Committee
September 4, 2012**

Designated Federal Official (DFO)

- Morizio, Louis (Program Manager) – Acting DFO

Members Present

- Armstrong, Ken
- Hitchcock, Colleen – Committee Chair
- Kalimeris, Angeliki
- Lees, Rodger
- Marshalek, Mark
- Zachary, Martha

Members Absent

- Fishman, Annie
- Wells, Gary

Program Owners

- Awalt, Debra – Wage and Investment
- Momon-Townsend, Deborah – Wage and Investment

TAP Staff Present

- Babb, Rose A – Management Assistant
- Dominguez, Marianne – Program Analyst
- Fields, Anita – Program Analyst

TAS Staff

- Szargowicz, Lisa – Supervisory, Associate Advocate

Public Participants

None

Welcome / Announcements

Morizio welcomed everyone to the call. The minutes for August were approved for posting.

Hitchcock welcomed everyone and stated the following:

Members should mark their calendar for TAP's Annual Face to Face meeting the week of December 3 through the 7. Three locations have been identified for these meetings, Fort Lauderdale, FL, Brooklyn, New York, and Seattle, WA. There are two groups visiting each city; the first group of members will be arriving on Monday, December 3 through December 5 and the second group will arrive Wednesday, December 5 through

Friday, December 7. Hitchcock informed members that the details are now being worked out and will have an update for members at the next teleconference meeting in October. In the meantime, if there are any questions, members should contact Hitchcock via email.

DFO Report

Morizio acted as the DFO and mentioned the following:

- TAS has an external website, (www.taxpayeradvocate.irs.gov). This website is informative; it tells the public what TAS does. In addition, there is the 2013 objective report and links that directs the public to improveirs.org website for TAP meetings.
- TAP's first and second year members are asked to return their Tax Check Waiver forms to Linda Rivera in national office, Washington, DC. If members have filed their taxes jointly, they should secure their spouses' signature before returning the forms.
- There are two options for possible legislative issues that come to TAP. Those issues can be referred to Systemic Advocacy for further review and possible inclusion in the National Taxpayer Advocate's Annual Report to Congress, or the submitter can be referred to their legislators.

Portfolio Advisory Report

Szargowicz mentioned the following:

- SA has reviewed the Internal Revenue Manual regarding the Practitioner Priority Services (PPS), IRM and started implementing some changes with regard to tax practitioners' priorities telephone calls on the IRS toll free line.
- When a practitioner calls the PPS line, he or she is limited to the amount of ten transcripts per call. Her recommendation to the IRS will be to have no limit,
- A practitioner is also limited the amount of cases per call. They can only ask about 5 cases per call. Her recommendation to the IRS will be to have no limit,
- Due to the budget cuts that have reduced the amount of employees to take calls, practitioners will be asked to call at times that may provide less hold time.

Program Office Input

- Awalt mentioned that the toll free line has been inoperable since Friday, August 31 due to power reboot problems; this situation should be back on track today by noon.

- IRS website has undergone a face lift, members are asked to take a look at it and, submit any comments they may have to Dominguez. It has really improved in many areas including the search engine.
- Training on the filing season will begin soon.

Subcommittee Report Out – (Toll Free Report)

Team A

Kalimeris mentioned that her subcommittee is finishing up their assignment.

Team B

Armstrong mentioned that his subcommittee has finished up with their last issue and, that the cover page for the toll free report looks good.

Referral

Dominguez mentioned that the referral format was posted to TAP Space as part of the pre-reads. She welcomed any comments. Marshalek was unable to review the format prior to the call; he will review and email his comments to Dominguez. Everyone else is content with the draft.

Outreach Report

Fields mentioned that the Outreach Report was not final but will have the outreach figures for the next teleconference meeting in October.

Mentoring Program

Lees did not have any new information on mentoring, but mentioned that he will contact members Zachary and Armstrong to get new suggestions or ideas to improve the mentoring program for new members.

Comments

There were no comments

Closing

Morizio and Hitchcock thanked the members for joining the call. The meeting was closed.

The next teleconference is scheduled for Tuesday, October, 2, 2012 at 11 p.m. EST.

**Taxpayer Advocacy Panel (TAP)
Toll Free Project Committee
August 7, 2012**

Designated Federal Official (DFO)

- Lacrishea McClendon
- Dominguez, Marianne (Program Analyst) – Acting DFO

Members Present

- Fishman, Annie
- Kalimeris, Angeliki
- Lees, Rodger
- Marshalek, Mark
- Wells, Gary
- Zachary, Martha

Members Absent

- Armstrong, Ken
- Hitchcock, Colleen – Chair

Program Owners

- Awalt, Debra – Wage and Investment
- Momon-Townsend, Deborah – Wage and Investment

TAP Staff Present

- Babb, Rose A – Management Assistant
- Dominguez, Marianne – Acting Program Manager
- Fields, Anita – Program Analyst

TAS Staff

- Birts, Tamara – Program Analyst

Public Participants

- None

Welcome / Announcements

Dominguez welcomed everyone to the call. The minutes for July were approved for posting with some minor edits.

Chair Report

- Marshalek was present at the Joint Committee Face to Face meeting. He provided the Chair Report and stated the following:
- Members discussed that all the Project Committees will try to conduct their F2F meetings as early in the year as possible, to incorporate the training into their meeting. It will thus be a 3 day meeting. Depending on how many total Project

Committees there are, these F2F can overlap to minimize timeframe and yet not place an undue burden on the support staffs. Thus, if there are 6 Committees, the meetings may be able to be held over a 2 week span, with the "virtual training overlapping 2 Committees (training at the beginning and end of these meetings). This will accomplish getting the new members up to speed quicker and enabling this virtual training at a site that would be compatible to properly view it (an IRS Office).

- Members also discussed and came up with some great ideas of getting the TAP message out, through social networking.

TAP Manager Report

Dominguez acted as the TAP Manager and mentioned the following:

- Panel members were sent an email with- Form 13013-D, Tax Check Waiver. Members were asked to return this information in a timely manner.
- Susan Gilbert has sent an email requesting panel members to review and update their biography on TAP Space.
- TAP is waiting for approval from the Executive Director of Systemic Advocacy, Rena Girankis on the status of recruitment packages for new members.

DFO Report

McClendon reported that the DFO training was cancelled. Her office is addressing ID Theft cases. The National Taxpayer Advocate has created another task force – understanding examination issues.

McClendon was unable to stay for the remainder of the call. She excused herself and designated Dominguez as Acting DFO.

Systemic Advocacy Updates

Annual Report to Congress – Birts stated the following:

- Her office currently has 21 most serious problems, 7 status updates, 10 most litigated issues, and 11 Legislative recommendations. As these issues are researched and developed the National Taxpayer Advocate will decide what needs to move forward so these numbers may change by the time the report is published.
- The National Taxpayer Advocate is required to report on the 20 most serious problems affecting taxpayers each year and has the option to report on more than 20.
- Status updates are items that were covered in prior annual reports as most serious problems and the National Taxpayer Advocate feels the unresolved items need to be reviewed again but not as in-depth as a full blown MSP.
- Most Litigated Issues – are issues that taxpayers take to court most often.
- Legislative Recommendations – are issues the National Taxpayer Advocate feels need to be fixed by changing existing tax laws.

- Program Office Input
- Awalt stated that she did not have much to report, but did mention that her office is still working on changes of the IRS website. Originally the target date was this month, but has been changed to the following month. The objective of the team is to make the website more manageable for the average taxpayer. Many new features that will be available will allow a taxpayer to get to the answer they need on the web, without having to call an IRS office for further information.

Subcommittee Report Out

Team A

Kalimeris mentioned that she has completed the assignment given to her when member Catherine McPeak resigned.

Team B

Armstrong was not present; Dominguez reported that his subcommittee completed 2 of 3 referrals, 1 is pending. Once the subcommittee report is finalized, it will be sent to Lees to combine into one report.

Outreach Report

Fields presented her outreach numbers for the month of July.

Mentoring Program

Lees did not have any new information on mentoring, but mentioned that a member requested a mentor and some clarification on how TAP works.

Comments

None

Closing

Dominguez thanked all for joining the teleconference.

*Certification: The committee approved these minutes by consensus on September 4, 2012.

The next teleconference is scheduled for Tuesday, September 4, 2012 at 11:00 p.m. (ET).

**Taxpayer Advocacy Panel (TAP)
Toll Free Project Committee
July 3, 2012**

Designated Federal Official (DFO)

- Lacrishea McClendon – Absent
- Dominguez, Marianne (Program Analyst) – Acting DFO

Members Present

- Armstrong, Ken
- Hitchcock, Colleen - Chair
- Kalimeris, Angeliki
- Lees, Rodger
- Marshalek, Mark
- Rollins, Jackie, TAP Vice Chair
- Zachary, Martha

Members Absent

- Fishman, Annie
- Lees, Rodger
- Wells, Gary

Program Owners

- Awalt, Debra – Wage and Investment
- Momon-Townsend, Deborah – Wage and Investment

TAP Staff Present

- Babb, Rose A - Management Assistant
- Dominguez, Marianne - Program Analyst
- Fields, Anita - Program Analyst

TAS Staff

- Birts, Tamara – Program Analyst

Public Participants

- None

Welcome / Announcements

Hitchcock welcomed everyone to the call. The minutes for May and June were approved for posting. Hitchcock stated the following:

- The interviews for TAP's 2012 panel members has been completed, Final selections for those members chosen to serve on the TAP will be made soon.

- The analysis of the TAC Survey results have been completed, it will be in the National Taxpayer Advocate's June Report to Congress.
- Suggestions for TAP's virtual training for this winter should be submitted by members no later than July 9th to Dominguez for submission to Gilbert to incorporate into the Joint Committee Agenda.
- Thanks to Rodger Lees for his Matrix presentation at the Toll Free Face to Face meeting in May.

DFO Report

Dominguez acted as the DFO and mentioned the following:

- Dominguez report that Catherine McPeak and Sue Tatum have resigned from the panel.
- Tatum was an active member and was assigned many roles that need replacement.
 - Kalimeris volunteered to permanently take over the role of representing the Toll Free Project Committee on the JC Screening Committee.
 - Lees volunteered to mentor Ken Armstrong.
 - Armstrong volunteered to lead the Team B subcommittee.
- An Ad Hoc Committee will be formed to explore ways the virtual meeting can be improved for all members new and returning.

Portfolio Advisor Report

Lisa Szargowicz, Supervisory Associate Advocate of TAS, is on leave; she will provide this report during the August 7th teleconference.

Systemic Advocacy Update

Birts stated that SA Analyst have gone through some staffing changes. Intermediate Intervention and Advocacy projects have been combined with field systemic advocacy. Birts stated that her office will be involved into more Information Gathering Projects, IGPs. The IGPs will be split into two categories:

- Type I – will cover new laws, procedures and emerging issues that will be assigned to an analysts or technical liaisons. These IGPs will have a quarterly status update requirement and an initial expiration date of one year.
- Type II – will cover potential projects; these projects will be ranked and assigned to analysts. Analyst will gather information and, have 90 days to decide what needs to be done. These issues may be worked by collaborative teams, or elevated to MSP status to become part of the ARC, or may become legislative recommendation.

Both types of IGPs may also be closed as not validated.

Program Office Input

Awalt stated that she was not present at the Toll Free Face to Face meeting, but, she received some good questions and is waiting on responses to give to Dominguez.

Her office is preparing for the next filing season, adding additional phone applications - "Where is my refund".IRS.gov. The language and message will be changed, making it much more simplified for taxpayers to navigate.

The goal for this past filing season was to achieve 61% level of service; Awalt stated that level of service goal was surpassed by 5% bringing it to 66%.

Subcommittee Report Out

Kalimeris mentioned that there has been a lot of progress in editing her draft report Lees will incorporate those portions for the two members that have resigned. Everyone else in her subcommittee is almost finished with their report. Kalimeris and Marshalek will begin working on new issues.

Armstrong mentioned that he has been making many test calls, an average of 5 in 24 hours. He noted that it is a laborious task, but has got some good information. He has added this to Information Accuracy Referral form.

Outreach Report

Armstrong mentioned that he spoke with 2 panel members on the importance of performing and providing outreach in their monthly report. He noted that the responses he received were not good.

Dominguez mentioned the TAP Trifold is helpful to writing up issues but should not deter members from capturing the issue, from the public who wish to remain anonymous.

Fields presented her outreach numbers for the month of June.

Rollins mentioned to members that they should gather as many details as possible about their outreach events. A separate sheet of paper can be used to capture additional details.

Mentoring Program

Hitchcock mentioned that during the face to face meeting last month, a lot was accomplished with mentoring; she spoke with Wells and she was encouraged by the discussion.

Comments

Rollins asked Dominguez for a list of the issues the committee is currently working on. Dominguez mentioned the list of items and discussed them briefly with Rollins.

Rollins mentioned the ACS Call Center toll free number 1-800-829-0922 is busy for taxpayers to get answers to collection questions, and it rolls over to the 1040 toll free line. This does not help taxpayers get the information they need.



Action Item

Dominguez will provide Awalt with an email describing the problem for further research.

Closing

Dominguez and Hitchcock thanked all for joining the teleconference.

The next teleconference is scheduled for Tuesday, August 7th, 2012 at 11:00 pm EST.



**Taxpayer Advocacy Panel (TAP)
Toll Free Project Committee
June 5 – 6, 2012**

Designated Federal Official (DFO)

- Lacrishea McClendon, DFO

Members Present

- Angeliki Kalimeris
- Annie Fishman
- Colleen Hitchcock
- Gary Wells
- Kenneth Armstrong
- Mark Marshalek
- Martha Zachary
- Roger Lees

Members Absent

- Catherine McPeak
- Sue Tatum

TAP Staff Present

- Fields, Anita – TAP Analyst/Note Taker
- Marianne Dominquez, TAP Analyst
- Louis Morizio, TAP Manager

TAS Staff Present

- Tamara Birts, Systemic Advocacy Analyst
- Dorry Curran

IRS Staff

- Robin Callahan, Program Owner
- Deb'orah Momon-Townsend, Program Owner Liaison

Welcome & Roll Call/Quorum

McClendon opened the meeting and welcomed everyone to the meeting.

Dominguez and Morizio introduced themselves and welcomed everyone to the meeting. The members went around the room and introduced themselves. Roll Call was conducted during the Introductions, quorum is met.

The South Florida Local Taxpayer Advocate Terri Crook welcomed everyone to Plantation, Florida. She thanked everyone for their hard work on the Panel. She spoke about the extremely high increase in Identity Theft in Florida and that her staff is working hard to resolve cases of taxpayers that have been victimized by Identity Theft.

Chair Report

Hitchcock spoke on outreach and the importance of getting out there and doing outreach. She also spoke on the recruitment and where TAP is in the process. She also encouraged members to volunteer to help in the interview process.

Call Site Tour

Hitchcock shared her experience of the call site tour. The Seattle call site only handles customer account questions. They also have a pilot program for Identity Theft and have approx. 250 employees working ID Theft issues. She also discovered that half of the employees working in that call site are seasonal employees. Hitchcock asked questions pertaining to training. She found that the IRS does not have segmented training for the employees in the call site. The call site employees also have yearly CPEs.

She also asked questions pertaining to handling time. The time is measured in seconds. Colleen stated that she thought the tour was very insightful and wished that everyone could have had the experience. There was a discussion on the quality review process and how quality is measured.

National Office Report

Morizio informed the committee that we are now in the interview phase of recruitment. Tiffany Todaro is the acting TAP Director for the next ninety days. The Joint Committee meeting is scheduled for July in Indianapolis and the agenda is full. Morizio discussed the annual meeting and the possibility of virtual training. He discussed that all travel must be made through the TAP staff because certain guidelines must be met in order to comply with GSA Regulations.

DFO Report

McClendon shared information pertaining to identity theft. TAS inventory has increased approximately 57 percent from last year. She shared that the NTA gives a report to Congress every year regarding the top 20 issues. ID theft is one of the biggest and growing issues. McClendon passed out the NTA's comprehensive Bill of Rights. She also shared that a survey was conducted and only 9 percent of taxpayers feel that they rights before the IRS. McClendon stated that TAS want taxpayers to know that TAS is there to assist taxpayers not harm. She shared that there is a debt master file that is open to anyone where people can get names and SSNs of dead people; and this is causing an increase in Identity Theft.

Systemic Advocacy Report

Birts gave an overview of the office of Systemic Advocacy (SA). They analyze the issues to try and find the root cause. She also shared that if an issue comes into her realm, SA will contact an LTA in TAS and a TAP manager to see if someone else is working on the same or a similar issue to see if information can be shared and worked together. She also shared the SA organizational structure.

- SA has technical liaisons: Campus, Collection and Examinations.

- SA directors and analyst work with division and executives and senior IRS management to review policies and procedures and recommend improvements. The solutions may be systemic changes or legislative remedies.
- SA analyzes trends, manage projects and portfolios, manage TAP issues and projects, track IMD reviews, and task forces.
- SA also work, Common Issue Dispositions, identify Appropriate Issues and advocacy projects (these are systemic problems that do not pose a hardship).
- SA success stories include: Notifying taxpayers of approved Installment Agreements, Reasonable Cause Assistant (RCA), and Theft of Decedent SSNs.
- She discuss a little about the Annual Report to Congress (ARC). She explained where the NTA gets the issues that is reported and how the team develops the issues.

Toll Free Program Office

Callahan spoke about the strategies to direct traffic from the phones to the web. The office has enhanced “Where’s My Refund”. They began directing taxpayers to request transcripts via web or phone. Interactive Tax Assistant implemented eight new topics to allow more taxpayers to resolve their own issues. Where’s My Amended Return started inputting transaction codes during initial processing so information is available in IDRS indicating we have receive and amended return and it is being processed. Practitioner Priority Service (PPS) is informational messages has been added to promote the use of e-Services for transcript, and electronic account resolution (EAR) for other account related issues, implemented on March 2012. On-line services will be developing an online Installment Agreement for those who owe taxes.

Quality – Customer Accuracy (FY 2012 thru April) – Account Calls – 95.4 percent (including procedural cases), Tax Law Calls-92.7 percent

Calls Answered (FY 2012 thru April) – Account Calls answered – 14,519,776, Tax Law Calls answered – 2,279,882 (both are less than planned, decrease in demand)

Earlier in the year Debra Awalt mentioned that her office welcomes any ideas that will direct traffic away from the phones and towards the IRS website. Morizio, Dominguez, and Awalt agreed to use this topic as a new project for this committee following the completion of the current referral.

Momon-Townsend calls an overview of what she does as the TAP liaison. She informed that all projects will come to her for review before going to the IRS directors.

TAPSpace Presentation

Dominguez explained the importance of using TAP Space and documents will now be posted to TAP Space in lieu of sending them through email. This process has always been in place, but some members preferred to receive documents via email. The TAP Staff is mandating the use of TAP Space, to make sure that a member is able to always find a certain document at all times.

Dominguez gave a brief overview of TAP Space which she showed the panel members how to navigate through TAP Space to do the following:

- Add/View/Edit your individual Biography
- View another member's Biography
- View documents pertaining to this project committee
 - And add comments regarding the document posted
- Start a Discussion Topic and Reply to the Discussion Topic
- View documents pertaining to the Joint Committee

Outreach Report

Fields gave the outreach report for the month of May and she also gave a brief overview on how to correctly complete the outreach and hours reporting form.

Referral Formatting

Lees went through the referral process. He shared the TAP style guide and discussed the components of a referral, the do and don'ts of a referral and what TAP members have available to them. He went through each step of the TAP referral form.

Subcommittee Breakout Sessions

The committee divided up into their subcommittees to work on their assignments.

Closing

Hitchcock stated that it was a productive meeting and closed the meeting for the day.

June 6, 2012

Welcome

McClendon opened the meeting and Hitchcock welcomed everyone back.

Subcommittee Breakout Sessions

The committee divided up into their subcommittees to work on their assignments.

Subcommittee Report Outs

Team A – Kalimeris reported that they could not work on the new issues because they need more research. They sent questions back with Robin Callahan. Those questions were:

- How many 4442s are prepared due to unresolved end of day issues?
- Are there quality reports identified for end of day procedures not being followed?
- How are managers handling unresolved end of shift calls?
- What is the average length of time to handle unresolved end of shift calls?

She also stated that the first topic of discussion was issue 18403 – CSR getting back to taxpayer within a reasonable time. The possible recommendation will be a reasonable callback time (3 days) with a method of categorizing priority calls.

The other two issues: 18914 & 22498 will be worked together. The subcommittee will differentiated between dropped calls and “end of shift “calls. After a short discussion of these issues the consensus was that we need to do more research to move forward with a referral. The team went over the edits for the first referral draft.

- Kalimeris will request flow scripts, to be able to further clarify her issue
- Marshalek will clarify a few points on his issue
- McPeak will need to review the edits and clarify her issue/Angeliki will contact
- Lees will continue the edits on this referral

Action Items

- Momon-Townsend will get answer back to panel regarding statistics that require an interpreter and the statistics for Spanish speaking callers.
- Callahan will research questions given to her and send to Dominguez.

Team B – Dominguez reported that the subcommittee had to rewrite the referral; they identified additional information that was needed to complete the referral. They started to work on additional topics and were able to draft referrals for those topics.

The subcommittee found that some of the issues covered under Information Accuracy needed to be address separately. A new subtopic was created as “History of Calls”. And “Information Accuracy” was renamed as “Training on Interconnecting Forms and Schedule”.

Overall, the subcommittee worked and drafted a referral for the following topics:

- Training on Interconnecting Forms and Schedule
- History of Calls
- Call History

Public Input

No member of the public was present for this meeting.

Closing

In closing the panel went around and gave brief thoughts on how the meeting went.

Hitchcock thanked everyone for attending the meeting.

Dominguez reminded everyone that the subcommittee's calls are scheduled for June 14. Team A at 10 a.m. EST and Team B at 1 p.m. EST.

Morizio thanked everyone for attending the meeting.

McClendon closed the meeting.

The next meeting is a teleconference on Tuesday July 3, 2011, at 11:00 a.m. EST.

***Certification: The committee approved these minutes by consensus on July 3, 2012.**



Taxpayer Advocacy Panel (TAP)
Toll-Free Project Committee
May 1, 2012

Designated Federal Official (DFO)

- Lacrishea McClendon – Absent

Members Present

- Armstrong, Ken
- Fishman, Annie
- McPeak, Catherine
- Hitchcock, Colleen
- Kalimeris, Angeliki
- Lees, Rodger
- Zachary, Martha

Members Absent

- Tatum, Sue
- Marshalek, Mark
- Wells, Gary

Program Owners

- Awalt, Debra
- Momon-Townsend, Deborah
- Smith, Devonne
- MaCray, Kevin

TAP Staff Present

- Gold, Annie – Secretary
- Morizio, Louis – Acting Director of TAP
- Dominguez, Marianne – Program Analyst
- Fields, Anita – Program Analyst

TAS Staff Present

- Lisa Szargowicz – Portfolio Advisor
- Birts, Tamara – Systemic Advocacy Analyst

Public Participants

None

Welcome & Roll Call

McClendon welcomed everyone to the meeting. Gold conducted roll call.

The April minutes were an Administrative no approval needed, but the March minutes were approved.

Chair Report (Colleen Hitchcock)

Hitchcock welcomed everyone to the meeting. She informed everyone that the application for new TAP members closed as of last Friday; there were over 800 total applicants. She thanked everyone who participated in the survey. She also thanked those who participated on the Business Credit Calculator and if there are any additional responses please forward them to her.

DFO Report (Lacrishea McClendon)

McClendon reported that TAS is still working hard with the Identity Theft problem. The TAS staff has started to work on Nina Olson's (National Taxpayer Advocate) Annual Report to Congress.

Portfolio Advisory Report (Lisa Szargowicz)

Szargowicz explained the role of Portfolio Advisory and how it relates to the TAP members and how both roles can assist each other. Currently, she is working on the Practitioner Priority Line. There is a lot of wait time. Sometimes it takes up to 30 and 60 minutes, to only then be routed to an assistor who cannot help them. The 800 number is having issues related to budget problems. Nina Olson assigned each Local Taxpayer Advocate (LTA) a Portfolio to serve as advisors for whatever the portfolio stands for. It involves continual research as well as interaction with the Advisory Committee and aide to the NTA. This process will increase our Advocacy base. The NTA's main objective for the Portfolios is to improve TAS ability to correct problems within the IRS in order to advocate at a higher level. Increasing efforts through outreach through TAP members, taxpayers, outreach efforts, etc.

Rolls and responsibilities of the Portfolio Advisor are:

- Establish a sound working knowledge of the issues given to us.
- Have an understanding and evaluate whether or not the issues should be elevated even further and make recommendations as the TAP make recommendations.
- Have quarterly meetings to share information and issues.

Currently there are six or seven issues that have been received from TAP. We are in the process of determining whether or not it is Systemic, or should it be elevated further.

Referral OPTIONS

Dominguez informed the committee the question came up during one of the Sub-Committee calls if the committee wanted to do separate referrals to the Joint Committee based on categories. It was suggested that it may be more helpful to send it an all in one referral for review versus individual referrals of Accounts Management topics. Consensus was reached to work it as one referral.

Program Owner Comments (Debby Awalt)

Awalt introduced her manager, Kevin McCray. Awalt will be attending multiple Face to Face Meetings, and has decided to have Robin Callahan attend the Toll Free Project Committee Face-to-Face meeting in June. We have made it through the Filing Season. The Commissioner has given some briefing talking on the filings season along with Nina

Olson. Telephone traffic has slowed down. There have been complaints on the level of service, which has gone down this year by 61 percent of service; in March it was 67 percent. Currently, the toll free line has been receiving very complex questions. One thing you may encounter in your outreach is people wanting transcripts. Colleges are requesting transcripts to get their financial aid, now you can go on www.irs.gov to order the transcript and have it sent only to the address on record. Or they can call the toll free line and get it faxed to them. Szargowicz added that if the taxpayers has a 2011 balance due and is requesting a 2011 transcript, they will not be available until June 2012. Some colleges are asking for the pin numbers to obtain this information from IRS. There is a link on the website to obtain this information.

Subcommittee Report Out – Team A (Kalimeris – Lead)

Team A has completed the first referral and it is currently in the edit process.

Subcommittee Report Out – Team B (Dominguez – Temporarily Leading)

Team B is at the final stages of gathering information needed to complete all the referral. Hope to have completed by next month.

Outreach Report (Kenneth Armstrong and Anita Fields)

Not a lot of new information. A good opportunity with the survey issuance. Very rewarding got the word out to an IRS employee. Outreach reports are due.

Anita Fields reported not all of the Outreach reports are in. Toll Free has a total of ten outreaches with audience reached 131 with one issued received.

Reminder to the Committee send Fields any issues you may have for input.

Mentoring Program (Hitchcock, Tatum, Lees)

- Hitchcock stated she is mentoring Gary Wells who is doing really well. Lees is mentoring Martha Zachery. Based on what he has seen from her work with the preliminary referral, she is doing well. Dominguez will temporarily be mentoring Ken and contacting him for any clarification and any information he may need. And Colleen will also help with advice.

Screening Committee Representative

Tatum will be out for a short term. She was our Screening Representative. We need someone to participate on the screening once a month. The meeting is on the second Thursday, 2:00 p.m. ET. Kalimeris volunteered to cover for Sue Tatum. Dominguez will forward to Kalimeris this week the information she will need.

Face-to-Face Update

Marianne explained the Face-to-Face is June 4, 5 and the 6 with travel on June 4. We will meet all day on June 5 beginning at 8:00 a.m. until 4:30 p.m. We will have a half-day on June 6 and travel home in the afternoon.

All travel arrangements for the Panel Members will be conducted by the TAP Secretary.

Closing

Hitchcock thanked everyone for being on the call and looks forward to meeting everyone at the Face to Face Meeting.

McClendon thanked everyone for all the good information that was shared. The meeting is now closed.

The next meeting is Face-to-Face and is scheduled for Tuesday, June 5, 2012, at 8:00 a.m. EST.

The next teleconference is scheduled for Tuesday, July 3, 2012, at 11:00 a.m. EST.

***Certification: The committee approved these minutes by consensus on July 3, 2012.**

**Taxpayer Advocacy Panel (TAP)
Toll-Free Project Committee
Administrative Meeting
April 3, 2012**

Designated Federal Official (DFO)

- Lacrishea McClendon

Members Present

- Armstrong, Ken
- Fishman, Annie
- McPeak, Catherine
- Hitchcock, Colleen
- Kalimeris, Angeliki
- Lees, Rodger
- Marshalek, Mark
- Wells, Gary
- Zachary, Martha

Members Absent

- Tatum, Sue

Program Owners

- Awalt, Debra
- Momon-Townsend, Deborah
- Smith, Ivonne

TAP Staff Present

- Gold, Annie – Secretary
- Morizio, Louis – Acting Director of TAP
- Gilbert, Susan – Acting Program Manager
- Dominguez, Marianne – Program Analyst
- Fields, Anita – Program Analyst

Public Participants

- None

Welcome & Roll Call

McClendon, Hitchcock, Dominguez welcomed everyone to the meeting. Gold, TAP Secretary conducted Roll Call.

Chair Report (Colleen Hitchcock)

Hitchcock reminded everyone that we are in the middle of the recruiting process and it will be open until the 22 of April. TAP is looking for volunteers from Arkansas, Pennsylvania and Texas. The survey will be given out the week of April 9. This would be a wonderful

time to conduct Outreach while issuing the twenty-five surveys and talking with as many Taxpayers as possible. Everyone is encouraged to get out there and ask questions. Taxpayers are waiting in lines. TAP is going strong with another two-year extension granted by the Commissioner. Continue to be positive and passionate about your roles. Members are encouraged to keep track of their time. TAP needs this information in our recruiting efforts and to show how much time is spent.

Morizio pointed out that TAP needs everyone to indicate how many issues you bring back from the Outreaches. As things stand, TAP is not seeing any corresponding issues. If you get 10 issues from the Outreach Event make sure they go to your Analysts so they may be input into the database. They then go on to the Screening process and on to the Joint Committee for approval. Recruitment is well over two hundred applications and there is over four hundred in process. Within the next week or so, TAP will be contacting the individuals who started their applications to see if they want to finish it and if we can encourage them to continue with the process of becoming a member. The people who are doing the TAC survey, the Director of Field Assistance asks us to be aware of how long the Taxpayers have been waiting in lines. Some of them may have been waiting for a very long time and frayed nerves or put you off from doing the surveys. Just be aware and do not be personal.

The TAP survey is going out to all 80 TAP members. The results of the Survey will be shared with each member upon completion.

DFO Report (Lacrishea McClendon)

Some of the issues addressed in Taxpayer Advocate Service (TAS):

- ID theft cases have increased; TAS has identified what some of the issues are, how they are affecting the Taxpayers, and how it is affecting the Service. We attended a CAP Conference in early February, discussed this issue and wanted Congress to know.
- Taxpayer Bill of Rights, we are building on this issue in getting more information out there to the Taxpayers.

Portfolio Advisory Report

Szargowicz was unable to attend the call; she will provide her report during next month's meeting.

Program Owner Comments (Debby Awalt)

Accounts Managements is recording all incoming calls with software that analyzes topics that are spoken on the calls; this is used for research.

- One topic that showed a large increase this year was Identity Theft cases. IRS had posted information/messages online to make Taxpayers aware of ID Theft.
- Another topic identified by the software was a new act called FATCA which deals with Foreign Accounts. As a result of this, the office Large Business and

International (LB&I) updated the information on IRS.Gov with frequently asked questions.

- Something else that was identified with the software was that we were receiving a large number of calls regarding making payments; IRS posted a clearer message on the website on how to make Credit Card payments.

Fresh Start Phase 2 Initiative program is where assistance is available to Taxpayers on how they may be able to go through the process of trying to get the failure to pay penalty waived online. There was a news release that went out on this back in March.

Armstrong asked about a process for Phishing Scams. Dominguez advised that the IRS does have a process in place to report Phishing Scams; these cases are referred to Treasury Inspector General for Tax Administration (TIGTA). IRS does not contact Taxpayers by Email. The IRS will not call them unless they are working on a case and they are waiting on a return call.

Action Item: Dominguez will forward to everyone the Email for TIGTA on Phishing Scams; use this email to forward the Email Scam your clients received.

Awalt added we are winding down to the April 17 filing deadline. Get those tax returns done. Refunds are going out.

Subcommittee Report Out – Team A (Kalimeris – Lead)

Our targeted date was April 1, 2012, to have our first referrals completed. We are waiting on one person to complete their information. We should have it done by our next Subcommittee call. You can email Dominguez and she will assist in compiling the referrals.

Subcommittee Report Out – Team B (Tatum – Lead)

Dominguez reported in Tatum's absence that there were two subcommittee calls this month. During the first call the subcommittee went through every issue and some did not have merit, so they were dropped. Some of the issues were incomplete. The Taxpayer was not telling the whole story nor provided enough information to tell what the problem was. There were a total of 8 issues dropped.

On the second call a lot of questions were answered by the subject matter experts. Awalt also answered a lot of the questions. There was a lot of clarification to allow writes up of referrals. Hopefully, by the end of this month the subcommittee will have enough information to have a draft referral finalized for the May committee meeting.

Outreach Report (Kenneth Armstrong)

Armstrong stated we have a few talking points:

- Effective outreach is critical to ensure that TAP serves its primary function: serving as a listening post for taxpayers. Taxpayers need to know that TAP exists and understand TAP's mission and role.

- TAP is basically the eyes and ears for the IRS by interacting with and making presentations to individual taxpayers, civic organizations, professional associations, community coalitions, and other citizen groups all around the country. Outreach presentations by TAP members are to provide information about TAP and solicit taxpayer suggestions for improving the IRS.
- Use Reporting Spreadsheet for reporting your Outreach activities and hours.
- Use tools within the Outreach Toolkit. It contains lots of useful information, like success stories, PowerPoint presentation, media guidance, etc...Contact your LTA, but do not primarily depend off of them for outreach. Because sometimes they do not have any.
- Send announcements to your local radio stations. Contact your local organizations to see if you can give a presentation or provide information for their newsletters. Examples are social associations, libraries, small business associations, Rotary, Lion's clubs, local accounting societies all have weekly and monthly meetings.
- Take a copy of your Annual Report to show them what kind of work we do. We have limited copies but can get them at www.improveIRS.org.
- Include TAP Email signature address

Action Item: If needed, Dominguez will assist you in creating a TAP blurb and Email signature.

- Go through your local directory and call accountants. Ask them what type of common problems they have encountered with the service from the IRS and what type of burden is it giving his/her clients.
- Get issues, ask if they have any problems with IRS; their experience with using Toll Free lines.
- Don't be afraid to go to the Internet, examples: Blog, Facebook etc.
- Share your experiences with friends and ask them to do presentation at their local events.
- All travel expense must be approved by the TAP Program Manager prior to incurring into the expense.

Dominguez added as a pre-read, the Form 14388, *Self Mailer* and Form 14013, *Member Application*. We now have the barcode that will automatically take you to a website on irs.gov by using a Smart phone. You would need an application to utilize this option. Jackie Rollins put a blurb in her local homeowners association about TAP. Take advantage of all

the different types of choices you have for Outreach. You will be receiving a list of Armstrong's suggestions via email. If you have any questions, contact your Analyst (Marianne Dominguez), Kenneth Armstrong, Colleen Hitchcock, Susan Gilbert, and Anita Fields we are available to assist you.

Outreach Numbers (Anita Fields)

Fields informed the committee the total number of Outreaches reported is twenty-one (21) and reached a total number of 10,622 people. Newspaper articles and media were utilized mostly to reach the taxpayers.

Zachary asked about her corrected business cards. Dominguez informed the members the Business Cards have been ordered but not received in the office yet. Some TAP Brochures will be sent out to use until they come.

Action item: Susan Gilbert will follow up on the business cards with Otis Simpson.

Mentoring Program (Hitchcock, Tatum, Lees)

- Hitchcock said things are going well for her mentee she has sent emails.
- Rodger said continual emails to Martha and so far so good.
- Armstrong stated that Tatum is his mentor, and they have been in contact.

TAC Office Surveys (Susan Gilbert)

Gilbert stated we have completed the survey to go out and ask Taxpayers to complete. We have thirty three (33) volunteers going to thirty eight (38) TACs to do this. Next we will be sending out the packages with the surveys in them. We spoke with Leslie Baronich about administering the TAC. We are really excited about doing a partnership in getting the surveys out there.

Comments/Questions

We will be gathering information about the Toll Free Face-to-Face in June for Toll Free on the 4, 5 and 6. When you hear from us, please respond. We will need information to secure your travel arrangements.

Closing

Hitchcock thanked all for being in attendance and we covered some really good information. McClendon thanked everyone and adjourned the meeting until the next teleconference.

The next teleconference is scheduled for Tuesday, May 1, 2012, at 11:00 p.m. EST.

***Certification: The committee approved these minutes by consensus on May 1, 2012.**



Taxpayer Advocacy Panel (TAP)
Toll-Free Project Committee
March 6, 2012

Designated Federal Official (DFO)

- Lacrishea McClendon

Members Present

- Armstrong, Ken
- Fishman, Annie
- McPeak, Catherine
- Hitchcock, Colleen - Chair
- Kalimeris, Angeliki
- Lees, Rodger
- Marshalek, Mark
- Tatum, Sue
- Wells, Gary
- Zachary, Martha

Members Absent

None

Program Owners

- Awalt, Debra
- Momon-Townsend, Deborah – Absent

TAP Staff Present

- Babb, Rose A. - Management Assistant
- Dominguez, Marianne - Program Analyst
- Fields, Anita - Program Analyst
- Gilbert, Susan - Senior Program Analyst
- Morizio, Louis - Program Manager

TAS Staff

- Birts, Tamara – Management Program Analyst for Systemic Advocacy
- Szargowicz, Lisa - Local Taxpayer Advocate in Rhode Island (Toll Free TAS Portfolio Advisor)

Public Participants

None

Welcome / Announcements/ Chair Report

Hitchcock welcomed everyone to the call and said the following:

- TAP recruitment season begins on March 19 and ends on April 27. When panel members perform outreach activities, they should mention that TAP is currently recruiting. If anyone is interested, they can apply at www.improveirs.org.
- TAP materials such as pens, coin purses, luggage tags, etc. cannot be handed out to anyone until further notice from the TAP staff. The only outreach materials that can be provided are the TAP Brochures, business cards and TAP trifold mailers.
- Within the next few weeks, TAP members will receive some information via email in regards to conducting surveys at the TAC Office.

Approval of Minutes

The February minutes were approved by consensus.

Program Office Input

Awalt welcomed everyone, but had no new information to report.

Subcommittee Report Out

Team A (Kalimeris – Lead)

Kalimeris reported that she developed and distributed a time line for her subcommittee to follow when researching their assigned issues and for completion of the issue referral forms. Her subcommittee is currently finalizing some research, testing and analysis of the assigned issues and indicated that if the subcommittee team members continue to follow the time line, they will be able to present the final draft of their referral prior to the April meeting of the full committee.

Team B (Tatum – Lead)

Tatum also reported that she prepared a time line with assistance from Dominguez. Her subcommittee is currently reviewing issues again in order to decide which issues don't have merit and will not be submitted to the IRS. By April 12, she expects her subcommittee will have researched all issues. If the subcommittee continues to follow the time line, they will be able to have a draft of their referral by April 19 as well. She mentioned to all team members that Dominguez is the contact person to assist them with their research.

Dominguez stated that the referral format that was used last year by the Small Business / Self Employed (SBSE) Committee will be used by the Toll Free Project Committee for referral reports during 2012. She stated that she will work with the subcommittee Chairs to draft the team referrals. Each subcommittee will review their team's referral report and will make changes. A Quality Review committee will be established within this project committee to review all referrals before sending them to the Joint Committee.

Outreach Report

- Fields mentioned that there were 13 outreach events touching a total of 81 people for this month. Although some members have used the old outreach spread sheet, members were instructed to use the new spreadsheet sent to them via email.

- Armstrong stated that he has contacted some local organizations to arrange speaking engagements but hasn't had any responses as of this call.
- Tatum mentioned she has an outreach event March 6 (tonight) and another one scheduled for next week.

Mentoring Program

Morizio informed everyone that the role of the mentor is to guide, coach and engage the mentee by offering guidance to them in all their TAP activities to ensure they clearly understand their role and responsibilities. Mentors will now report out to the Project Committee on a monthly basis during project calls. This will ensure that Mentees are being mentored and they can continue to request any additional guidance, as needed. Mentoring will be added to all Project Committee Agendas, as a monthly follow-up item. Our current mentors are Tatum, Lees and Hitchcock.

Volunteer Hours Spreadsheet

Dominguez informed everyone that the Volunteer Hours Spreadsheet has been finalized and was sent to all team members a week before the call.

Dominguez asked if anyone had any questions about the spreadsheet. No questions were asked.

Office Report

Morizio mentioned the following:

- Effective March 26, the TAP Director Shawn Collins will be detailed as the Executive Assistant to the Executive Director of Systemic Advocacy. Also effective March 26, Morizio will be the Acting TAP Director for 30 days. Morizio also informed the team that Susan Gilbert joined this call because she will be the Acting Program Manager for TAP east while he is on his detail as TAP Director.
- He reminded volunteer mentors to connect with their mentees in an effort to assist new members.
- The face-to-face meetings and times were approved; the dates are June 4 through June 6; the location will be the IRS office in Plantation, Florida. June 4 will be a travel day, June 5 will be a full meeting day, and June 6 we will meet for a half day and travel the other half of the day.

Closing

McClendon and Hitchcock thanked all for joining the teleconference.

The next teleconference is scheduled for Tuesday, April 3, 2012 at 11:00 a.m. EST.

***Certification**

The committee approved these minutes by consensus on May 1, 2012.

**Taxpayer Advocacy Panel (TAP)
Toll-Free Project Committee
February 7, 2012**

Designated Federal Official (DFO)

- McClendon, Lacrishea – Absent
- Morizio, Louis – Acting DFO

Members Present

- Armstrong, Ken
- Fishman, Annie
- McPeak, Catherine
- Hitchcock, Colleen
- Kalimeris, Angeliki
- Lees, Rodger
- Marshalek, Mark
- Tatum, Sue
- Wells, Gary
- Zachary, Martha

Members Absent

None

Program Owners

- Awalt, Debra
- Momon-Townsend, Deborah – Absent

TAP Staff Present

- Babb, Rose A, – Management Assistant
- Collins, Shawn – Director of TAP
- Dominguez, Marianne – Program Analyst
- Fields, Anita – Program Analyst
- Morizio, Louis – Program Manager

Public Participants

None

Opening

As the Acting DFO, Morizio opened the call and welcomed everyone to the Toll Free Project Committee teleconference. Fields performed roll call. Quorum was met for the meeting. No guests were on the call.

Welcome/Announcements

Hitchcock also welcomed everyone to the teleconference and thanked everyone for joining.

Chair Report

Hitchcock reported the following:

- TAP Recruitment season begins March 31 through April 29. Members are asked to spread the word to the public and their friends.
- TAP is working on an online survey. This survey will be used to measure TAP's performance. In addition, the survey will be completed by members after each face to face meeting occurs.

Approval of Minutes

The January minutes were approved by the full committee with some minor corrections.

Program Owner Input

Awalt, did not have any new information to share with the project committee.

Dominguez mentioned to members that the Mapping of the Toll Free Line is available for panel members to review in TAP Space under their respective Sub Committee folders.

Morizio mentioned to members that if they are registered on TAP Space, they should ensure that Toll Free Committee is checked off in order to receive notifications. If this is done, each time Dominguez posts documents in TAP Space, members will receive notifications to view the documents.

Subcommittee Report Out

Team A (Kalimeris – Lead)

Kalimeris stated that her subcommittee can make recommendations that states that the Star Key menu option connects taxpayers to speak to someone. Her committee is working on the following:

- (1) Kalimeris – Talking to a live person
- (2) Lees is researching- Enhancements for International Callers
- (3) Marshalek is researching- Multiple Telephone Transfers
- (4) McPeak is working on clarifying what are the issues of the local offices
- (5) Zachery- Separate Language Options

Team B (Tatum- Lead)

Tatum's groups have chosen to work the category of "Information Accuracy"

The subcommittee is divided in (3) different groups:

- (1) Armstrong, Fishman and Wells "Incorrect/Incomplete information provided by the Assistor
- (2) Hitchcock- Employee is referring the call instead of resolving
- (3) Tatum – History of calls

Morizio and Dominguez stated that some LTAs, and Analysts, from Systemic Advocacy Analysts will be joining the teleconferences next month. They will provide input on the rate of customer satisfaction and surveys. Morizio mentioned that he thinks the advisors will be most helpful on the subcommittee calls.

Outreach Report

Armstrong stated there was an outreach meeting this week. Some of the discussion topics were:

- Ensure that members turn in their outreach reports timely each month.
- There is a new format for reporting outreach activities; it will be discussed during next month's call.
- Spread the word through business organizations regarding formal and informal meetings; use your imagination for outreach activities.
- Contact the IRS Media Specialist via TAP Analyst for media publications.
- There is an outreach tool kit in the members' hand book.

Business cards will be finalized and ordered before February 21.

Fields stated that there were 11 outreaches this month submitted by 5 members; she will send a reminder along with the attachment each month to members to submit their outreach activities.

Morizio mentioned if members have articles they would like to submit for media publication, he asked that they submit those articles to Dominguez or Fields.

Member Comments

None

Public Input

None

Closing

Morizio and Hitchcock thanked all for joining the teleconference. Morizio adjourned the meeting.

The next teleconference is scheduled for Tuesday, March 6, 2012, at 11:00 pm EST.

***Certification: The committee approved these minutes by consensus on Tuesday, March 6, 2012.**

**Taxpayer Advocacy Panel (TAP)
Toll-Free Project Committee
January 3, 2012**

Designated Federal Official (DFO)

- Nancy Ferree, Acting DFO

Members Present

- Armstrong, Ken - Vice Chair
- Fishman, Annie
- Hitchcock, Colleen - Chair
- Lees, Rodger
- Marshalek, Mark
- Tatum, Sue
- Wells, Gary
- Zachary, Martha

Members Absent

- Kalimeris, Angeliki
- McPeak, Catherine

Program Owners

- Awalt, Debra
- Momon-Townsend, Deborah

Staff Present

- Berkey, Steve – TAP HQ Analyst on behalf of TAP Director
- Dominguez, Marianne – TAP Analyst/Note Taker
- Ferree, Nancy – TAP Program Manager
- Fields, Anita – TAP Program Analyst

Guest

None

Welcome & Roll Call/Quorum

Hitchcock and Ferree welcomed everyone to the Toll Free Project Committee meeting. Berkey introduced himself as a TAP Headquarters Analyst. He is sitting on the call on behalf of the TAP Director, Shawn Collins. She would like to attend all Committee Meetings. The Refund Processing meeting was also scheduled for the same time. She attended that meeting to request that the meeting time be changed.

Dominguez conducted roll call. Quorum was met.

Review of Assignments

Dominguez reported the following committee assignments:

- The Chair is Colleen Hitchcock and the Vice Chair is Ken Armstrong.
- The representatives to the JC for the following positions are:
 - Outreach - Ken Armstrong (Vice Chair)
 - Communication - Mark Marshalek
 - Quality Review - Rodger Lees
 - Screening - Sue Tatum
- We have the following mentors and mentees:
 - Colleen Hitchcock (Mentor) paired up with Gary Wells (Mentee)
 - Sue Tatum (Mentor) paired up with Ken Armstrong (Mentee)
 - Rodger Lees (Mentor) paired up with Martha Zachary (Mentee)

Explanation of Pre-Reads

The following was posted to TAP Space as pre-reads for this meeting:

Toll Free Information within Nina's Annual Reports to Congress

Dominguez stated that she went through the National Taxpayer Advocate's Annual Report to Congress for the years 2000 through 2010, and detached all pages that referenced the Toll Free Number as one of her Most Serious Problem.

Previously Elevated TAP Issues

TAP previously elevated some issues related to the Toll Free Customer Service. The referrals and responses to the referral are available on TAP Space.

Classification of Toll Free Issues

Dominguez went through the TAP Database and classified all of the issues into 5 categories.

Suggestion from Mary Jo Werner

Panel Member Mary Jo Werner sent an email for the committee to review. A subcommittee can review it as an assignment.

Toll Free Project Committee Description

This document is self-explanatory.

Toll Free Power Point Presentation

As part of the Annual Meeting workshop the Power Point Presentation on TAP Space was provided to all panel members with an overview of the Toll Free Operation.

Project Scope & Project Outline

Last year Joint Committee members Harlan and Herb, drafted a Scope and Outline for this project. The committee agreed by consensus to continue with this outline.

Program Owner Input

Awalt addressed that the program office does not currently have any projects for the committee. The program office looks forward to seeing the current project once it's completed.

Berkey reminded everyone that the committee will mainly be working with issues that TAP has gathered within the past couple of years. We will also work in conjunction with Systemic Advocacy.

Awalt mentioned that the Toll Free lines have reduced their hours of operations, in order to cut down on expense. The new hours of operations are 7:00 am – 7:00 pm local time.

Formation of Subcommittee

The group agreed by consensus to accept Dominguez' recommendation of forming the subcommittees based off of everyone's time zone.

Team A

Rodger Lees
Angeliki Kalimeris
Mark Marshalek
Martha Zachary
Catherine McPeak

Team B

Sue Tatum
Annie Fishman
Ken Armstrong
Colleen Hitchcock
Gary Wells

Meeting Dates for Subcommittees

Team A agreed to meet on the second Thursday of every month at 10:00 am ET.

Team B agreed to meet on the second Thursday of every month at 1:00 pm ET.

Outreach

Armstrong explained that outreach activities should be reported every month. He advised to use the template that has been posted to TAP Space. Fields will be sending out an email every month to remind everyone to send in their outreach report. Dominguez will send out outreach opportunities to everyone starting this month.

Dominguez reminded everyone that reimbursement of travel expenses must be approved prior to the outreach event. The expense must be approved by Morizio.

Hitchcock recommended that everyone watch the DVD that the Headquarters staff will be mailing out to everyone. It contains a lot of helpful information on performing outreach.

Louis A. Corsaro the Assistant Managing Editor from the Pittsburgh Business Times published an article on Lees, titled “Five Minutes with J. Rodger Lees of the Taxpayer Advocacy Panel”.

Public Input

None

Closing

Dominguez informed everyone that Kalimeris is unable to attend these meetings at 2:00 pm ET. She is proposing a change to 11:00 am ET. The committee agreed to change the time to 11:00 am ET.

Hitchcock thanked everyone for attending the meeting. Ferree adjourned the meeting.

The next meeting is a teleconference on Tuesday, February 7, 2012, at 11:00 am EST.

***Certification: The committee approved these minutes by consensus on February 7, 2012.**