



## 2013 Meeting Minutes Toll-Free Phone Line Project Committee

- November 19, 2013
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  - July 16, 2013
  - June 19, 2013
  - May 21, 2013
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  - February 19, 2013
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- 

### Toll-Free Phone Line Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes November 19, 2013

#### IRS Staff

- Debra Awalt (Absent) – Program Owner
- Sheila Andrews – Director of Taxpayer Advocacy Panel
- Rose A. Babb – Management Assistant
- Tamara Birts (Absent) – Program Analyst
- Tracy Martin (Absent) – Program Analyst
- Deborah Momon-Townsend – Program Analyst
- Louis Morizio (Absent) – Designated Federal Officer
- Linda Rivera – Program Analyst
- Lisa Szargowicz (Absent) – Program Analyst

#### TAP Members

- Ken Armstrong –Kalispell, MT
- Kirt Chartier – Atlanta, GA
- Francis Grinnan – Rochester, NY
- Colleen Hitchcock – Lacey, WA
- Deidre Harrison (Absent) – Mandeville, LA
- Angeliki Kalimeris – Woonsocket, RI
- Boris Mikhail – Lindenhurst, NY
- Elena Tscherny – Washington, DC
- Gary Wells – Anchorage, AK
- Lina Wongshue (Absent) – Orlando, Florida



- Martha Zachary – Inver Grove Heights, MN

### **Welcome/Announcement**

Armstrong welcomed everyone to the teleconference. Armstrong thanked the members for selecting him as the next TAP Chair for 2014. He also thanked the entire committee for their support including those that are rotating off of TAP Panel at the end of November.

### **DFO Report**

Rivera was the DFO for Morizio who was absent. There were no new announcements. Awalt, Szargowicz and Birts were not present. However, Rivera read a message from Awalt and Momon-Townsend expressing their gratitude for the dedication that TAP

members have shown through the year. Rivera informed the members that Szargowicz will no longer be the Portfolio Advisor for TAP she indicated that she will keep members appraised when there is a new portfolio advisor assigned to work with TAP.

### **TAP Director**

Andrews thanked the members rotating off for their dedication and commitment to TAP work. She also thanked the full committee for the work they have done all year. Andrews mentioned that the new membership package will be going forward to Treasury Department. Feedback is expected by December 1, 2013. Due to the Government Shut down, TAP's Annual Regional meeting has been postponed from the first week of December to the week of February 24, 2014.

### **Screening Team**

Tscherny provided a status update on the following issues:  
Issues # 28278, 28427 28457, 28487, 28499, 28505, 28607 and 28674 – These issues have been identified as workable for 2014. The new member orientation will be held on December 9, 2013.

Issue # 28314, 28735 and 28747 – these issues has been placed in the parking lot.

Issue # 28513 – This issue has been dropped.

### **Out Reach Report**

Kalimeris stated that there was one outreach report submitted for the month of October. There were 2 events with an audience of 126. One issue was submitted.

### **Mentoring**

Kalimeris, Hitchcock and Zachary mentioned that their mentees (Grinnan, Chartier and Tscherny) are on point.



### **Comments**

Rivera reminded the members to send in their outreach and hours report at the end of each month.

### **Public Participation**

LeAnn Boswell mentioned that she was grateful for the opportunity to listen in on TAPs meetings she plans to join future teleconferences.

### **Closing**

Armstrong and Rivera thanked all for joining the call. The next teleconference will be held on December 9, 2013, Eastern Standard Time. This teleconference meeting will be an administrative meeting with the TAP members.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
September 17, 2013**

**IRS Staff**

- Debra Awalt – Program Owner
- Sheila Andrews (Absent) – Director of Taxpayer Advocacy Panel
- Rose A. Babb – Management Assistant
- Tamara Birts – Program Analyst
- Tracy Martin (Absent) – Program Analyst
- Deborah Momon-Townsend – Program Analyst
- Louis Morizio (Absent) – Designated Federal Officer
- Linda Rivera – Program Analyst
- Lisa Szargowicz (Absent) – Program Analyst
- Paul Wight – Program Analyst

**TAP Members**

- Ken Armstrong – Kalispell, MT
- Kirt Chartier (Absent) – Atlanta, GA
- Francis Grinnan – Rochester, NY
- Colleen Hitchcock – Lacey, WA
- Deidre Harrison (Absent) – Mandeville, LA
- Angeliki Kalimeris – Woonsocket, RI
- Boris Mikhail – Lindenhurst, NY
- Elena Tscherny – Washington, DC
- Gary Wells – Anchorage, AK
- Lina Wongshue (Absent) – Orlando, Florida
- Martha Zachary – Inver Grove Heights, MN

**Welcome/Announcement**

Armstrong welcomed everyone to the teleconference. The minutes for August were approved for posting. Armstrong mentioned that he reviewed the rebuttal list of issues and has written up draft responses on a few issues. Rivera will send those rebuttals via email to the full committee. Armstrong asked the members to feel free to make any comments on his rebuttal.

**DFO Report**

Rivera was the DFO for Morizio who was absent. Rivera informed the members that the TAP Chair and Vice Chair Election Nominations for 2014 positions have closed on September 16, 2013. Members will be sent an email with the date for an all member teleconference meeting. At that time, the nominated candidates will make a presentation to everyone about themselves and their platform. Subsequent to the teleconference, the election will take place to select the candidates to fill both positions.

### **Program Report**

Awalt mentioned that the IRS is continuing to work on transcripts; the objective is to have as many taxpayers use the IRS website. This process will enable the IRS to service other taxpayers to use the website more efficiently. This year Volunteer Taxpayer Assistance Programs have assisted Small Business Taxpayers with Schedule Cs, this assistance will be expanded 2014. Awalt mentioned tax law calls are dropping off, this may be due to E-file and other programs that are assisting taxpayers with their tax law questions. Awalt also stated that her office is also focusing on account issues and tax practitioner hotline issues to improve the IRS services.

### **Systemic Advocate Update**

Birts stated her office is currently reviewing the Internal Revenue Manual, IRM and Internal Guidance Memos. In addition, she mentioned that she will be reviewing the IRS rebuttals and will provide feedback to Rivera later today.

### **Screening Team**

Tscherny' provided a status update on the following issues:  
Issue # 28278 – This issue has been placed in the parking lot.  
Issue # 28314 – This issue has been referred to IRSAC to work.  
Issue # 28407 – This issue has been placed in the parking lot.

### **Subcommittee Report Out**

Mikhail and Zachary's referrals were approved by the Joint Committee Review team and has gone forward to the IRS for consideration.

### **Out Reach Report**

Kalimeris stated that there were a total of 130 outreaches for the month of August with an audience of 21. Kalimeris thanked all those who submitted outreach reports.

### **Mentoring**

Kalimeris, Hitchcock and Zachary mentioned that their mentees (Grinnan, Chartier and Tscherny) are on point. They may not need to consult with their mentors as they have progressed quickly doing great outreaches. Both Chartier and Tscherny have attended Tax Forums last month on behalf of TAP in Atlanta and Washington, DC.

### **Comments**

Rivera reminded the members to send in their outreach and hours report at the end of each month.

### **Public Participation**

None

### **Closing**

Armstrong and Rivera thanked all for joining the call. The next teleconference is scheduled for October 22, 2013 at 11:00 Eastern Standard Time.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 20, 2013**

**IRS Staff**

- Debra Awalt – Program Owner
- Sheila Andrews – Director of Taxpayer Advocacy Panel
- Rose A. Babb – Management Assistant
- Tamara Birts – Program Analyst
- Tracy Martin – Program Analyst
- Deborah Momon-Townsend – Program Analyst
- Louis Morizio – Designated Federal Officer
- Linda Rivera – Program Analyst
- Lisa Szargowicz – Program Analyst
- Paul Wight – Program Analyst

**TAP Members**

- Ken Armstrong – Kalispell, MT
- Kirt Chartier – Atlanta, GA
- Francis Grinnan – Rochester, NY
- Colleen Hitchcock – Lacey, WA
- Deidre Harrison (Absent) – Mandeville, LA
- Angeliki Kalimeris – Woonsocket, RI
- Boris Mikhail – Lindenhurst, NY
- Elena Tscherny – Washington, DC
- Gary Wells – Anchorage, AK
- Lina Wongshue – Orlando, Florida
- Martha Zachary – Inver Grove Heights, MN

**Welcome/Announcement**

Armstrong welcomed everyone to the teleconference. The minutes for July were approved with one minor edit to be made prior to posting. Armstrong mentioned he completed his draft Taxpayer Assistance Center (TAC) proposal outline for 2014 with the assistance of Morizio and Steve Berkey, TAP Senior Analyst. Members are asked to send their comments and/or suggestions to Armstrong with a copy to Rivera via email.

**DFO Report**

Morizio talked about the Joint Committee Face to Face Meeting held in Milwaukee earlier this month. It was very productive, and the entire parking lot list of issues was reviewed by all Project Committee Chairs. Some issues were dropped, added and there were some issues that should not have been on the list. After the review, the parking lot is now reduced by about 50%.



### **Program Report**

Awalt mentioned that her office is working on “Where is my Amended Return”, and there were some issues with the application that are currently being worked on.

### **IRS & the Department of Education (DOE) /FAFSA**

Martin provided an over view of the IRS Data Retrieval system communications through the Department of Education (DOE) website for taxpayers for the Free Application for Federal Student Aid (FAFSA). Martin stated that taxpayers can only access this system if applying for FAFSA on the DOE website. Martin also stated that schools will not require any additional input from students except, where there were modifications made to financial aid applications that may be inconsistent with the IRS data transcripts retrieved. Some authentication issues may prevent taxpayers from accessing the database.

Wight provided a follow up on Martin’s comments and he mentioned that there are a few ways to order/request transcripts, through the IRS.gov website, through a (TAC), or by calling accounts management. The transcripts requested at TAC offices are the same as requested on line or mailed to taxpayers. Any questions from TAP members will be fielded through Rivera to Awalt for feedback.

### **Systemic Advocate Update**

Birts stated her office is working on the National Taxpayer Advocate’s annual report to Congress and topics being considered include the Affordable Care Act. Birts participated in an outreach event with the DC LTA office and member Elena Tscherny.

### **Screening Team**

Tscherny provided a report on the status of the Screening Team Issues. Most of the screening issues were dropped and a few will continue to be reviewed.

### **Subcommittee Report Out**

Mikhail will be revising his subcommittee’s referral since it was not approved by the Joint Committee; the subcommittee will be resubmitting their referral.

Morizio reviewed Zachary’s subcommittee issue referral and made minor corrections subsequently; the issue was elevated to the IRS.

### **Out Reach Report**

Kalimeris stated that there were a total of 130 outreaches for the month of July with an audience of 21. Kalimeris thanked all those who submitted outreach reports.



### **Mentoring**

Zachary mentioned that she has not spoken to Tscherny but thinks that she is on point; Tscherny is welcome to call Zachary at any time for guidance. Hitchcock said that Chartier is on point and that she is very pleased. Chartier also joined this teleconference from the Atlanta Tax Forum there, he was conducting TAP Outreach.

Kalimeris stated that Frank is on point and that she is very pleased.

### **IRS Responses to Issues**

Armstrong asked members to carefully review the list of 2012 issues that were rejected by the IRS for rebuttals. Members should inform Rivera of the issues they would like to rebut. Rivera will put together a team once she receives the responses from the members.

### **Public Participation**

There were no members of the public on the teleconference.

### **Closing**

Armstrong, Morizio, and Rivera thanked all for joining the call. The next teleconference is scheduled for September 17, 2013 at 11 a.m. Eastern Standard Time.





**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 16, 2013**

**IRS Staff**

- Debra Awalt – Program Owner
- Deborah Momon-Townsend – Program Analyst
- Sheila Andrews – Director of Taxpayer Advocacy Panel
- Linda Rivera – Program Analyst
- Shandra Webb – Program Analyst
- Debra Scott – Program Analyst
- Louis Morizio – Designated Federal Official
- Rose A. Babb – Management Assistant

**TAP Members**

- Ken Armstrong – Kalispell, MT
- Kirt Chartier – Atlanta, GA
- Francis Grinnan – Rochester, NY
- Colleen Hitchcock – Lacey, WA
- Diedre Harrison – Mandeville, LA
- Angeliki Kalimeris – Woonsocket, RI
- Boris Mikhail – Lindenhurst, NY
- Elena Tscherny – Washington, DC
- Gary Wells – Anchorage, AK
- Lina Wongshue (Absent) – Orlando, Florida
- Martha Zachary – Inver Grove Heights, MN

**Welcome/Announcement**

Armstrong welcomed everyone to the call and thanked the members for their hard work on their referrals. There is one referral that is going forward to the Joint Committee. The minutes for June were approved by the full committee. Armstrong also reminded all committee members that any internal IRS information or documents shared by the TAP staff were to remain confidential. The documents are not to be shared publicly. They are solely for internal reviews. Rivera provided an Online Services briefing to the Committee for their review. She will provide the committee with any new updates for FY2014 as they are implemented.

**DFO Report**

Morizio provided a follow up on the proposed elimination of the Joint Committee (JC) Quality Review Team. The JC agreed that going forward there will be only the Committee Quality Review Teams. The Committee Quality Review (CQR) Teams will function to review all



recommendations. In addition, the CQR Teams will be rewriting the proposals instead of “just reviewing” which is the purpose of the QR team.

Morizio mentioned that the outreach spreadsheet has been revised. Starting with the July’s report, there will only be two columns for hours, one to record the outreach hours and the other for all hours spent on other TAP work. The hours reported for the first half of the year should be carried over to July when the committee members send their reports to Analyst Rivera next month. If members have any questions, they should contact Analyst Rivera. Morizio asked members not to share the PowerPoint Presentation with the public sent to them via email from Rivera.

### **Program Report**

Awalt did not have anything new to report; however, she reminded members that the next IRS furlough day will be July 22, 2013, for all employees. As a result of the furlough, there will not be any live telephone assistants to assist taxpayers however; the IRS websites will be available to assist taxpayers with tax questions during the furlough time.

### **Screening Committee Update**

Tscherny provided an update on the following issues –

Issue# 26293 & 26293, these issues were referred back to the Notices Project Committee.

Issue# 27411, this issue was referred to the online Subcommittee.

Issue # 27440, this issue will be referred to the Taxpayer Advocate Service

Issue#27500 & 27634 these issues have been dropped.

Issue# 27815, this issue has been referred to the Online Subcommittee.

Issue# 27817, this issue has been placed in the parking lot, some additional research needs to be done.

Issue#27818, this issue has been dropped.

Issue# 27821, this issue is a duplicate, IRSAC is working on it, and so, TAP has dropped it.

### **Subcommittee Report Out**

Boris’ Subcommittee is ready to go forward with their referral to the Joint Committee this referral should be on the next committee agenda in August.

Martha’s Subcommittee is waiting on Counsel (Attorney Advisor) to review before submitting to the Joint Committee. It is not likely that this referral will be on the next JC Committee meeting in August.

### **Out Reach Report**

Kalimeris stated that there were a total of 8 outreaches for the month of June with an audience of 94. Kalimeris thanked all those who submitted outreach reports.



Rivera reminded members that they should try to submit outreach reports timely; if there are no outreach activities, please provide an email with a quick update.

### **Mentoring**

Harrison mentioned that she has not spoken to Tscherny but thinks that she is on point; Tscherny is welcome to call Harrison at any time for guidance.

Hitchcock said that Chartier is on point and that she is very pleased.

Kalimeris stated that Frank is on point and that she is very pleased.

### **Public Participation**

There were no members of the public on the teleconference.

### **Closing**

Armstrong, Morizio, and Rivera thanked all for joining the call.

The next teleconference is scheduled for August 20, 2013, at 11:00 EST.

**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 19, 2013**

**IRS Staff**

- Debra Awalt, Program Owner
- Deborah Momon –Townsend, Program Analyst
- Linda Rivera, Sr. Program Analyst
- Louis Morizio, Designated Federal Official
- Lisa Szargowicz, Supervisory Associate Advocate, TAS
- Marianne Dominguez, Program Analyst
- Rose A. Babb, Management Assistant
- Shandra Webb, Program Analyst

**TAP Members**

- Angeliki Kalimeris, Vice Chair – Woonsocket, RI
- Boris Mikhail – Lindenhurst, NY
- Chartier, Kurt – Atlanta, GA
- Colleen Hitchcock – Lacey, WA
- Diedra Harrison – Mandeville, NY
- Elena Tscherny – Washington, DC
- Francis Grinnan – Rochester, NY
- Gary Wells – Anchorage, AK
- Ken Armstrong, Chair – Kalispell, MT
- Lina Wongshue – Orlando, FL
- Martha Zachary – Inver Grove, MN

**Welcome/Announcements Chair Report**

Armstrong welcomed everyone to the teleconference and he mentioned that the Subcommittees are moving along with comprehensive referrals. Armstrong thanked everyone for the hard work done in the subcommittees. The minutes for May were approved by the full committee.

**DFO Report**

Morizio thanked the members for volunteering their time to assist with recruitment interviews for TAP 2013. The selections for TAP applicants have been made for 2013 and will be elevated to Rena Girinakis, Executive Director of Systemic Advocacy. Subsequent to Rena's review, the package will be presented to National Taxpayer Advocate, Nina Olson and then to the Treasury Department where the final selections will be made for appointments to the TAP. The final status of those applicants that are selected should be known by October 2013.



The TAP Staff underwent realignment: Audrey Jenkins, Anita Fields, Marianne Dominguez, and Meredith Odom from TAP East Office were moved over to the parent

organization, Systemic Advocacy. Fields and Odom will continue to assist the committees with research. Babb, Knispel, and Powers will remain with TAP. Dominguez is on a detail for one year and Linda Rivera is the new Toll-free project committee analyst for the rest of 2013.

### **Portfolio Advisor Report**

Szargowicz stated that there is nothing new on Practitioner's Priority Service. However, she is reviewing the ARM with respect to practitioner's being serviced in the customer service priority. TAS has seen a surge in transcripts cases; for the fiscal year 2010 there were 1,286, 2011 – 1,245 cases and 2012 – 1674. With respect to secondary issues, there were 4,524 transcripts in 2012; 18% for education purposes and 61% for mortgages and financial purposes.

### **Program Office Output**

Awalt welcomed everyone to the teleconference; she mentioned that with the IRS filing season is over her office is now working on ID Theft cases. Awalt stated that IRS' second furlough day is June 14, and asked the members if they have so far received any negative responses from the public. Szargowicz mentioned that there were some upset customers in TAS.

### **Screening**

Tscherny stated that her subcommittee did not meet this month since there were no new issues for the committee.

### **Subcommittee Report Out**

Online

The Subcommittee Chair replacing Seelbach who has resigned last month is Mikhail. Currently, the Online subcommittee has submitted recommendations to the committee quality review team and is waiting for responses back to write up the final recommendation.

Public Information

Zachary will follow up on her subcommittee referral review that was posted to TAP Space; this is due to Rivera June 21, 2013, before sending to the Joint Committee, QR Team.

### **Outreach**

Kalimeris reported that for the month of May there were 24 outreaches for a total audience of 17,028. There were three issues gathered from those events.



### **Mentoring**

Hitchcock mentioned that she touched base with Chartier and that she is pleased with the work he is doing.

Kalimeris mentioned that Grinnan is doing well with his outreach and other activities for TAP.

Harrison's mentee Seelbach has resigned from TAP. Seelbach relocated to a state that has no current openings for members.

### **Public Input**

No comments.

### **Comments/Closing**

Armstrong thanked everyone for joining the call. Morizio closed the meeting.

The next teleconference is scheduled for July 16, 2013, at 11 a.m. EDT.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 21, 2013**

**Designated Federal Official (DFO)**

- Louis Morizio

**Members Present**

- Angeliki Kalimeris, Vice Chair
- Boris Mikhail
- Colleen Hitchcock
- Diedra Harrison
- Elena Tscherny
- Francis Grinnan
- Gary Wells
- Ken Armstrong, Chair
- Kirk Chartier
- Martha Zachary

**Members Absent**

- Wongshue, Lina

**TAP Staff Present**

- Audrey Y. Jenkins, Program Analyst
- Betty Scott, Program Analyst
- Anita Fields, Program Analyst
- Rose A. Babb, Management Assistant

**TAS Staff Present**

- Debra Awalt, Program Owner
- Deborah Momon-Townsend, Program Analyst

**Welcome/Announcements Chair Report**

Armstrong welcomed everyone to the teleconference; he mentioned the IRS Scandal and informed members that they can view the articles on the subject in TAP Space. The minutes for April were approved by the full committee. Armstrong mentioned that he is a member of two other committees; the Survey and the Annual Regional Meet & Teach Planning Committee. He is working on establishing different ways to provide training to new members. Armstrong suggested that members should take a look at the survey results; they will find it very informative.



### **DFO Report**

Morizio informed the members that he is now wrapping up the interviews for new panel members. Thanks to the volunteers that assisted with the interview process. In the next

few weeks, TAP will make the decisions on those applicants to be select for the 2013 panel membership. Morizio also thanked the members for their hard work and the great recommendations they have brought forth. Members should log into Tap Space and take a look at the articles on the IRS issues in the media; this may come up as a topic during outreach discussions.

### **Program Office Output**

Awalt welcomed everyone to the teleconference; she mentioned that the IRS filing season is over. The submission processing is finishing up the balance due returns. Awalt also mentioned that the IRS will be closed to the public on Friday, May 24 the first of its furlough days. There will be automated services available including the IRS Websites, but no live assistants will be available.

### **Screening**

Tscherny stated that there were no issues to be screened by her committee. However, the next subcommittee meeting will be on June 5 and she hopes to have something to report at the next full committee meeting in June.

### **Subcommittee Report Out**

On-line

The Subcommittee Chair replacing Seelbach who has resigned last month is Mikhail. Currently, the On-line subcommittee has submitted recommendations to the committee quality review team and is waiting for responses back to write up the final recommendation. The subcommittee is also reviewing new issues to define.

Public Information

Zachary mentioned that things are moving along fine with her subcommittee; she will have something to report on at the next meeting.

### **Outreach**

Kalimeris reported that for the month of April there were 15 outreaches for a total audience of 79. There were no issues gathered from those events.

Armstrong did an outreach through his local newspaper; he wrote up a "tax exempt" issue in his town's local newspaper. This issue came to him via a disabled taxpayer. Armstrong used the opportunity to turn the issue into an outreach opportunity for TAP.

### **Mentoring**

Hitchcock mentioned that she touched base with Chartier and that she is pleased with the work he is doing.





Kalimeris mentioned that Grinnan is doing well with his outreach and other activities for TAP.

**Public Input**

No comments.

**Comments/Closing**

Armstrong thanked everyone for joining the call. Morizio closed the meeting.

The next teleconference is scheduled for June 18, 2013 at 11 a.m. EDT.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 16, 2013**

**Designated Federal Official (DFO)**

- Louis Morizio, Program Manager, TAP East

**Members Present**

- Angeliki Kalimeris, Vice-Chair
- Colleen Hitchcock
- Elena Tscherny
- Francis Grinnan
- Gary Wells
- Ken Armstrong, Chair
- Louis Seelbach
- Martha Zachary

**Members Absent**

- Boris Mikhail
- Diedre Harrison
- Kirk Chartier
- Lina Wongshue

**TAP Staff Present**

- Rose A. Babb, Management Assistant
- Anita Fields, Program Analyst
- Audrey Y. Jenkins, Program Analyst

**TAS Staff Present**

- Debra Awalt, Program Owner
- Deborah Momon-Townsend, Program Analyst
- Tamara Britts,
- Lisa Douglas
- Lisa Szargowicz, LTA

**Welcome/Announcements Chair Report**

Armstrong welcomed everyone to the teleconference; he did not have any new announcements. The March meeting minutes were approved with minor changes to be made.



### **DFO Report**

Morizio informed the members that the recruitment process for 2014 ended on April 2. The next phase will be the interview process which is scheduled for the month of May. Morizio asked the members to consider assisting the TAP Staff with interviews. The interview panel consists of the TAP Program Manager, a panel member, and the Local Taxpayer Advocate. Those interested should send Fields an email with their available schedule.

### **Portfolio Advisor Report**

Szwargowicz did not have anything new to add; however, she stated that her office is working on the Practitioner Priority Hotline.

### **Program Office Output**

Awalt did not have anything new to report. However, she stated that the filing season is over and that even though legislation was signed late, there weren't many delays with respect to the processing returns.

### **Screening**

Tscherny reported on the status of the following issues:

- Issue #26806, *Customer Service not complying with Freedom Act*, this issue has been dropped.
- Issue #26826, *Toll Free – Service Line Employees*, this issue has been dropped.
- Issue #26850, *Toll Free – Rude Employee*, this issue has been dropped.
- Issue #26945, *Toll Free Phone Menu Not Helpful prefer a human*, has been dropped.
- Issue #18686, *Practitioners Priority Service (PPS) Call Length*, this issue has been referred to the Parking lot and will continue to be monitored.
- Issue #18115, *Unable to Speak to a Rep on PPS hotline*, this issue will be reviewed and possibly dropped.

### **Subcommittee Report Out**

Online

Seelbach reported that he will no longer be able to for fill his duties as a member and will be resigning therefore; Mikal will be the new subcommittee lead. Also, the subcommittee is continuing to focus on Practitioner Priority Service Line.

Public Information

Zachary mentioned that things are moving along fine with her subcommittee; she will have something to report on at the next teleconference.

### **Outreach**

Kalimeris reported that for the month of March, 5 members submitted outreach reports and 6 members did not submit any reports.



Kalimeris and Dominguez completed the TAP Outreach Tool Kit Revision.

Hitchcock mentioned that members should continue to connect with their Local Taxpayer Advocate. Some of the LTAs responsibility is to provide assistance to panel members to conduct outreach activities.

The issue of very few outreach activities reports are being submitted monthly will be addressed by the Chair of the committee.

### **Mentoring**

Hitchcock mentioned that she keeps in constant contact with Chartier and that she is pleased with the work he is doing.

Kalimeris mentioned that she did not speak with Grinnan recently, but does recall that he was on point the last time she spoke with him.

### **Public Input**

None

### **Comments/Closing**

Armstrong and Morizio closed the meeting and thanked everyone for joining the call. The next teleconference is scheduled for May 21, 2013 at 11 a.m. EDT.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 19, 2013**

**Designated Federal Official (DFO)**

- Louis Morizio

**Members Present**

- Angeliki Kalimeris, Vice Chair
- Colleen Hitchcock
- Francis Grinnan
- Gary Wells
- Ken Armstrong, Chair
- Kirk Chartier
- Lina Wongshue
- Louis Seelbach
- Martha Zachary

**Members Absent**

- Boris Mikhail
- Diedre Harrison
- Elena Tscherny

**TAP Staff Present**

- Audrey Y. Jenkins, Program Analyst
- Rose A. Babb, Management Assistant
- Anita Fields, Program Analyst
- Marianne Dominquez, Program Analyst

**TAS Staff Present**

- Debra Awalt, Program Owner
- Deborah Momon-Townsend, Program Analyst
- Tamara Birts, Systemic Advocacy Analyst
- Sandra Webb

**Welcome/Announcements Chair Report**

Armstrong welcomed everyone to the teleconference; he did not have any new announcements.

**DFO Report**

Morizio informed the members that the recruitment process for 2014 panel members is moving along. Nebraska, New Hampshire and Rhode Island have not turned out many



applicants thus far. However, members should remember to encourage friends, associates and network organizations in those states where TAP is recruiting to apply.

Dominguez will be starting a detail assignment beginning 3/25 in Systemic Advocacy. Jenkins will be the primary analyst for this committee for the next 60 days. All correspondence during this time must be sent to Jenkins.

Morizio reminded the members that all outreach activities that require reimbursements should be approved prior to the event. In addition, if members are attending conferences as presenters or manning booths for TAP, fees are normally waived by the organizations hosting the events.

### **Systemic Advocacy Update**

Birts did not have a report but did mention that Systemic Advocacy is waiting the National Taxpayer Advocate, Nina Olson, to determine which issues will be addressed in the 2013 National Taxpayer Advocate's Annual NTA Report to Congress.

### **Program Office Output**

Awalt welcomed everyone to the teleconference and introduced Sandra Webb her back-up. Awalt mentioned that this month, her office is rolling out "Where is my Amended Return" for tax preparers to review on IRS.gov website. Awalt also mentioned that in order to not affect the filing season, any furloughs likely to occur for IRS employees will take place subsequent to the filing season.

### **Screening**

Dominguez reported the status of the following issues:

- Issue #25396, *Toll Free Not ADA Friendly for Deaf* – there are no updates
- Issue #26652, *Taxpayers unable to receive transcripts for FASFA* combined with Issue #26772, *Transcript requests for FASFA*
- Issue #26620, *Suggestions for calls that have been lost has been* – has been dropped.
- Issue #26509, *Amended Return Status-* has been dropped.
- Issue #26436, *Step up 800 numbers on Call back system* – has been referred to the Parking lot and will continue to be monitored.
- Issue #26405, *CSRs not knowledgeable & Wait time* -- this issue was related to Form 2848 and was transferred to the Tax Forms and Publications Project Committee.

### **Subcommittee Report Out Online**

Seelbach reported that his subcommittee is continuing to focus on Practitioner Priority Service Line. There are some grass root issues that can be combined into this issue.



### **Public Information**

Zachary mentioned that things are moving along fine with her subcommittee; she will have something to report on at the next teleconference.

### **Outreach**

Kalimeris reported that for the month of February there were 26 outreaches for a total audience of 190. Six members did not submit outreach activities. Kalimeris reminded members that when talking to taxpayers and gathering issues, keep in mind that the taxpayers are not under any obligation to provide their contact information.

Armstrong reported that he had an outreach with AARP with an audience of 30 people.

### **Mentoring**

Hitchcock mentioned that she touched base with Chartier and that she is pleased with the work he is doing.

Kalimeris mentioned that she spoke to Grinnan; she stated she is impressed with his progress.

### **Public Input**

No comments.

### **Comments/Closing**

Armstrong thanked everyone for joining the call. Morizio closed the meeting. The next teleconference is scheduled for April 17, 2013 at 11 a.m. EDT.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
February 19, 2013**

**Designated Federal Official (DFO)**

- Louis Morizio

**Members Present**

- Angeliki Kalimeris
- Boris Mikhail
- Colleen Hitchcock
- Elena Tscherny
- Francis Grinnin
- Gary Wells
- Ken Armstrong
- Kirk Chartier
- Lina Wongshue
- Louis Seelbach
- Diedra Harrison

**Members Absent**

- Hector Santini
- Martha Zachary

**TAP Staff Present**

- Rose A. Babb, Management Assistant
- Marianne Dominquez, TAP Analyst
- Anita Fields, TAP Analyst

**TAS Staff Present**

- Tamara Birts, Systemic Advocacy Analyst

**IRS Staff**

- Sheila Andrews, TAP Director
- Debra Awalt, Program Owner
- Sherri Sneed, Program Owner

**Welcome/Announcements Chair Report**

Armstrong welcomed everyone to the teleconference. He stated that the committee is moving along with their projects well and may be requesting additional projects in the coming weeks.



### **DFO Report**

Morizio informed the members that the recruitment process for 2014 panel members is on target. This year, the National Taxpayer Advocate has decided to open up TAP recruitment internationally for US citizens abroad. The details on the international recruitment are still being worked out and members will be informed. Morizio mentioned that all pre read materials, agendas, rosters, subcommittee notes are posted to TAP Space for members to view or print. Members must check off their committee in order to receive notifications from their project committee. If members are unable to still receive notifications, please contact Dominguez or Morizio.

### **TAP Director**

Sheila Andrews introduced herself as the new TAP Director; she provided a background of her service with the IRS for 27 years. Andrews said that she is looking forward to working with the members and provided them with her contact information to call her anytime.

### **Systemic Advocacy Update**

Birts reported the following:

There were 70 topics divided among 12 groups

Tables #1 & 2 – Customer Accounts – topics included, processing amended returns, ITIN acceptance agents, strict liability penalties.

Table #3 & 4 – Entity – topics included accurate account transcripts, taxpayer services, and various identity theft issues.

Table #5 & 6 – Filing and Reporting Compliance – topics included SS – 8 worker classification, unreal audits, and taxpayer service within examination.

Table #7 – Outreach and Education – topics included EITC recertification and other studies, and lack of IRS business units monitoring adjustments.

Table #8 – 10 – Payment Compliance – topics included SBSE collection adjustments and return of levied proceeds, collection due process cases, lack of adequate live phone assistants, training and levies on SSA benefits.

Table #11 – Representation and Legislative – topics included health care, and last minute changes to the tax code.

Table #12 – Specialties – topics included impact of the lack of face to face training on tax administration, telework and exempt organization issues.



These topics will be further fleshed out, consolidated or dropped and the National Taxpayer Advocate will determine which one will become part of the 2013 Annual Report to Congress. A list will be published once the topics are actually determined.

### **Program Office Output**

Awalt welcomed everyone to the teleconference and mentioned that the IRS is slightly behind on processing tax returns.

### **Screening Team**

The Screening Team only had 3 issues to review.

TAP ID # 25396, *Toll Free: Not ADA Friendly for the Deaf* – Needed more information

TAP ID # 26369 *Toll – free Complaint* – Issue was dropped

TAP ID # 21763 *Multiple Transfers on PPS line* – Issue was combined with the PPS Issue currently in the parking lot.

### **Referral Response**

A team has been established to prepare a possible rebuttal to the IRS rejection for Internet Phone Applications. Kalimeris suggested that a possible solution can be routing international calls to one particular campus or office of the IRS.

### **Subcommittee Report Out**

Online

Seelbach reported that his subcommittee is continuing to focus on reduction of on line calls for tax transcripts. They have made progress on reducing the number of calls for transcripts. There was a discussion on the tax transcript tool and the language on the website. The online subcommittee is looking for additional projects. Dominguez suggested a parking lot issue titled Practitioner Priority Service Line.

Public Information

Armstrong reported for Zachary; he stated that there has been a lot of progress with the subcommittee's work. The subcommittee is consolidating the issues on one referral. Chartier will rewrite the referral consolidating some of the issues into goal statements to focus on one issue. Armstrong has volunteered to go through all the toll free responses referring toll free callers to IRS.gov.

### **Outreach**

For the month of February there were 7 outreaches for a total audience of 3,197. Kalimeris will be following up with members who have not submitted any outreach reports recently.

Members were reminded that even if they do not have any outreach each month, they must remember to submit the spreadsheet since the second tab reports on their hours.



### **Mentoring**

Harrison had a conversation with Seelbach last week. She discussed her history with TAP, outreach activities and also how Seelbach can reach out to his local taxpayer advocate.

Tschenery mentioned that she made contact with her local taxpayer advocate.

Morizio mentioned that if members cannot make contact with their local taxpayer advocate, they should inform both him and Dominguez for assistance.

### **Public Input**

No comments.

### **Comments/Closing**

Armstrong thanked everyone for coming. Morizio closed the meeting.

The next teleconference is scheduled for March 19, 2013 at 11 a.m. EDT.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
January 15, 2013**

**Designated Federal Official (DFO)**

- Morizio, Louis

**Members Present**

- Armstrong, Ken
- Chartier, Kirk
- Hitchcock, Colleen – Chair
- Jackson, Diedre
- Kalimeris, Angeliki
- Mikhail, Boris
- Seelbach, Louis
- Tschenery, Elena
- Wells, Gary
- Wongshue, Lina (Lisa)
- Zachary, Martha

**Members Absent**

- Grinnan, Frances
- Santini Hector

**Program Owners**

- Debra Awalt – Analyst, Wage and Investment
- Sneed, Sherri – Analyst, Wage and Investment
- Brown, Joanne – Subject Matter Expert, Wage and Investment

**TAP Staff Present**

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

**TAS Staff**

- Szargowicz, Lisa – Portfolio Advisor
- Birts, Tamara – SA Analyst (Absent)

**Public Participants**

- None



## **Welcome / Announcements**

Vice Chair, Kalimeris welcomed everyone to the first teleconference call of the year. The minutes from the face to face meeting in Plantation, Florida were approved by the full committee.

## **DFO Report**

Morizio mentioned the following:

Since most of the members are new and are not familiar with other members and staff in TAP's office, everyone should announce themselves before speaking. This is also helpful for the note taker.

Due to late legislation that was passed by the Congress, the IRS filing season will begin on January 30. This late filing date enables the IRS time to test their systems and processes. A news release referring to the filing season posted in TAP Space for members to view.

The National Taxpayers' Annual Report to Congress was released and a link was sent out by each project committee analyst to view the report in TAP Space.

The recruitment period for 2014 will be moved up this year from (February 22 through April 1) in an effort to have TAP members selections made prior to the end of November. TAP will do a recruitment analysis to determine the states they should recruit from for 2014.

During the Joint Committee Call in December there were some Tax Forms & Publication issues that were reviewed and approved. These issues will now be elevated to the IRS.

## **Portfolio Advisor Report**

Szargowicz stated the following:

Her portfolio is Practitioner Priority Service; she is working with a subcommittee that is reviewing and combining the issues that relate to the Practitioner's Priority line. Some of the primary issues affecting practitioners are the late filing season and the availability of getting an assistor from the IRS to assist them. Szargowicz has recommended adding an additional line with specific options to enable the assistor to reach the practitioners quicker.

The months of January and February are significant to TAS since there are many opportunities to conduct outreach events; this month is also EITC Awareness month. Szargowicz reminded the members to contact their Local Taxpayer Advocates in their home state and partner with them to do outreach events.



### **Systemic Analyst Report**

Birts mentioned that this year, the National Taxpayer Advocate, Nina Olson is concerned with the growing ID theft cases and so, there will be more assistants assigned to take those phone calls and work those cases.

### **Program Office Input**

Awalt mentioned that she didn't have much to report, because her office has been busy working with information related to the late legislation. She did inform everyone that there will be a new release on, "Where is my Amended Return Application" posted on IRS.gov, in March.

### **Screening Team**

Tscherny reviewed the list of issues screened by the screening committee.

These issues all relate to complaints from multiple Practitioners about the hold time on the PPS line. This also relates to a Practitioner having to wait a long time to then find out that they cannot be helped and must be transferred to another CSR (i.e. ACS).

These issues were combined and placed in the parking lot:

- TAP ID #: 25625, Toll Free: Practitioner Hold Time
- TAP ID # 23161, Cannot Contact ACS Wait Time Long
- TAP ID # 23638, Tax Practitioner Hotline Lack Access
- TAP ID # 22821, PPS Toll Free Customer Service
- TAP ID # 22780, Contacting ACS Toll Free
- TAP ID # 22657, ACS Option on PPS Toll Free Line
- TAP ID # 22068, Average Wait Time on PPS Hotline

This issue was placed in the Parking Lot for monitoring:

- TAP ID # 25586, Toll Free: Training/Reps Not Doing as Stated
- More information is needed; this issue will be placed on hold to verify if more issues are received relating to this inquiry.

More information was needed for the following issue:

- TAP ID # 25396, Toll Free: Not ADA Friendly
- More information is needed. Questions has been forward to the Program Owner, meanwhile this issue will be placed on hold.

These issues were dropped:

- TAP ID # 25417, Toll Free: Practitioner Priority Rude IRS Employee
- This issue is not a TAP issue, it is a complaint against an employee and it has been handled through management.
- TAP ID # 25223, Toll Free: Train CSR to Accept POA
- Clear procedures are in place for POA disclosure. This was an individual case, where the employee may have entered into High Risk Discloser; which requires question as the one stated on the Issue Description

TAP ID # 24332, Toll Free: Not Getting Forms & Pubs Request Timely  
The IRS has a reasonable mailing time that is similar to many other organizations; 7 – 15 days.

TAP ID # 23953, Toll Free Customer Service Bad dealing w/ID Theft  
The IRS is continuously trying to resolve the problem with ID Theft, actions have been taken and improvements have been made. But due to the complexity further developments are pending. As TAP this issue is too complicated and is out of our scope.

This issue was transferred out of the Project Committee:

TAP ID # 23481, AUR Toll Free Experience

This issue is not a Toll Free Issue; it is related to a systemic problem within the AUR process.

### **Subcommittee Report Out Online**

Seelbach mentioned that his subcommittee discussed reducing requests for transcripts and improving the automated language on the toll free line. In addition, Seelbach stated that the Department of Education has an automated data retrieval system tool. This system provides the public with information on tax returns and doesn't require taxpayers to spend time requesting transcript from the IRS.

Dominguez provided a brief overview on the two types of installment agreements, Streamlined and Non Streamlined agreements. Dominguez also indicated that she has posted some information on the installment agreements on TapSpace.

### **Public information**

Zachary mentioned that her subcommittee met yesterday and will review the list of messages from the IRS toll free line to ensure that the public is well informed. Chartier is in process of creating a problem statement and possible solution.

### **Outreach Report**

Kalimeris provided the outreach report. Local Taxpayer Advocates were given the contact information for the toll free committee members. There were 5 outreaches with an audience of 80 people; eight people did not submit the outreach/hours tracking spreadsheet.

Fields reminded the members to contact her if they have any questions on how to submit their outreach reports. Fields also stressed to the members that the hours spent on outreach activities is important for members to capture on their outreach monthly report.

### **Mentoring Program**

Hitchcock mentioned that she had a call with Chartier on Wednesday. Chartier shared some of his outreach efforts with her and has spoken to his local Congressman from his



home state, Georgia. Chartier has also made contact with some public officials. Chartier will also be involved in working on the TAP By Laws as well with the internal Communications committee.

Kalimeris had a call with Grinnan. Grinnan mentioned to her that he made contact with his local Local Taxpayer Advocate. Grinnan's current LTA is not familiar with TAP and so, Analyst Dominguez will follow up with the new LTA on how their services can be used to partner with TAP. Grinnan is also preparing to do an outreach event with an expected audience of 40 people.

### **Public Comments**

None

### **Closing**

Armstrong thanked all for joining the teleconference.

The next teleconference is scheduled for Tuesday, February 19, at 11 a.m. ET.





**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
December 3, 2012**

**Designated Federal Official (DFO)**

- Steve Berkey, DFO

**Members Present**

- Angeliki Kalimeris
- Boris Mikhail
- Colleen Hitchcock
- Elena Tscherny
- Francis Grinnin
- Gary Wells
- Ken Armstrong
- Kirk Chartier
- Lina Wongshue
- Louis Seelbach
- Martha Zachary
- Diedra Harrison

**Members Absent**

- Hector Santini

**TAP Staff Present**

- Marianne Dominquez, TAP Analyst
- Anita Fields, TAP Analyst
- Donna Powers, TAP Analyst

**TAS Staff Present**

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

**IRS Staff**

- Debra Awalt, Program Owner
- Sherri Sneed, Program Owner
- Joanne Brown, Subject Matter Expert

**Welcome/Roll Call/Quorum**

Berkey opened the meeting and welcomed everyone to the meeting.



### **Self-Introductions**

Dominguez and Berkey 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.

### **Elections**

Hitchcock and Armstrong discussed what it entails to be a chair or vice chair. Mikhail discussed his chairmanship of the Screening Committee. Berkey directed the committee to look at Chapter 8 of the Volunteer Handbook, which discusses the leadership of TAP. The following people volunteered for chair: Ken Armstrong, Boris Mikhail. The following people volunteered for vice-chair: Deidra Harrison, Angeliki Kalimeris, and Boris Mikhail.

Ken Armstrong was selected as chairman.  
Angeliki Kalimeris was selected as vice chairman.  
Kalimeris will handle outreach for the committee.

### **Screening Team**

Elena Tscherny  
Gary Wells  
Angeliki Kalimeris  
Martha Zachary

### **Quality Review Team**

Kirk Chartier  
Angeliki Kalimeris  
Lisa Wongshue

### **Internal TAP Communications Committee**

Boris Mikhail volunteered to represent this committee within the Internal Communications Committee.

### **Mentoring Program**

#### **Mentors**

Deidra Harrison  
Martha Zachary  
Coleen Hitchcock  
Angeliki Kalimeris

#### **Mentees**

Louis Seelbach  
Elena Tscherny  
Kirk Chartier  
Frank Grinnan

### **TAP Member Procedures**

The following was discussed:  
Ground Rules  
Telephone and E-Mail Etiquette  
Agenda and Pre-Read Information



#### Methods of Communication

- TapSpace – members will be getting information on TapSpace passwords, etc.
- Members should go in as soon as possible to update their bio information, and add the committees, etc.

#### Established Conference Call Meeting Dates

- The call will be held on the third Tuesday of each month at 11 a.m. ET.

#### Developing Consensus

#### Establish New Meeting Quorum

- The new quorum is 50 percent plus one, at this moment it will be seven members.

#### Signing Position Description and Volunteer Agreement

#### **Outreach**

Fields gave a presentation on Outreach, and discussed the importance of the monthly report.

#### **Review of 2012 Recommendations**

Dominguez reviewed the 2012 recommendations for Toll Free.

#### **Public Input**

No comments.

#### **Comments/Closing**

Armstrong thanked everyone for coming. Berkey closed the meeting.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
December 4, 2012**

**Welcome/Announcements**

Berkey opened the meeting. The new chair Armstrong welcomed everyone.

**TAS Portfolio Advisor**

The TAS Portfolio Advisor was not available, but she will make her presentation on next months' conference call.

**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 or procedural changes or legislative remedies.
- SA analyzes trends, manages projects and portfolios, manages TAP issues and projects, conducts and tracks IMD reviews, and participates on task forces.
- SA also works immediate intervention projects which are issue affecting a group of taxpayers that need a quick solution, and advocacy projects which are issues that affect a group of taxpayers but do not require a quick solution, in part because they do not pose a hardship).
- SA success stories include: Notifying taxpayers of approved Installment Agreements, Reasonable Cause Assistant (RCA) improvements, and changes to how the IRS handles the Theft of Decedent SSNs in an effort to cut down on their use in identify theft scams
- She discuss a little about the Annual Report to Congress (ARC). She explained where the NTA gets the issues that are reported and how the team develops the issues.

**Toll Free Program Office**

Sneed presented an overview of the Wage and Investment Customer Account Services. She shared a power point presentation which included the CAS organization overview, the customer base, areas of focus and customer experience improvements.

Brown an Operations Manager, Accounts Management, Philadelphia Toll Free Site. Brown will be the Subject Matter Expert (SME) for this committee. She discussed the PIN number, process improvements made to reduce handle time, and provide info message for issues that cannot be resolved by a CSR.

### **Introduction to Projects for 2013**

Sneed and Awalt discussed and presented the projects for 2013. Dominguez discussed the focus of the project. One subcommittee will look at only grassroots issues – arriving from the public. The calls will also come in through the website or the toll free number. The self-mailers are also a source of issues.

The other subcommittee will look at the main project received from the IRS. Boris suggested rescreening the 14 issues which are in the bucket for the committee. Berkey explained the screening process to the committee members. Look at all the information that is online to relieve the CSRs of the call volume.

### **Subcommittee Breakout Sessions**

The committee divided up into their subcommittees to work on their assignments. Three suggestions, as well as the grassroots issues were discussed.

1. One possibility would be to make sure the CSRs should be trained on irs.gov to be able to inform the taxpayer on where they should go to find information.
2. To improve current tools and come up with new tools on irs.gov.
3. Improve the message on the toll free to drive them to the website.
4. Grassroots Issues.

### **Subcommittee – Online/IDR**

Gary Wells  
Boris Mikhail  
Elena Tscherny  
Colleen Hitchcock  
Frank Grinnan  
Lisa Wongshue  
Louis Seelbach

### **Subcommittee – Public Information**

Ken Armstrong  
Martha Zachary  
Kirk Chartier  
Angeliki Kalimeris  
Hector Santini  
Deidre Harrison

The subcommittees call schedules:

Screening Team – First Wednesday of every month at 3 p.m. ET – The first meeting will be January 2, 2013.



Subcommittee Online – Second Tuesday of every month at 11 a.m. ET – The first meeting will be January 8, 2013.

Subcommittee Public Information – Second Wednesday of every month at 11 a.m. ET with the exception of October 17, 2013 and November 21, 2013 – The first meeting will be January 14, 2013.

### **Travel Procedures**

Dominguez gave a short presentation on the travel procedures. She also handed out the travel vouchers.

### **Closing**

Berkey asked the committee if they thought this meeting was beneficial. The committee complimented on how well organized everything was.

Armstrong said he thought “this committee was off on a good foot, great to get to know each person. We are here to help the taxpayers and their causes. People on the TAP are very passionate about their issues.” Then he thanked everyone for coming to the meeting.

Berkey closed the meeting.

**\*Certification: The committee approved these minutes by consensus on.**