

**2014 Meeting Minutes
Toll-Free Phone Line Project Committee**

- November 19, 2014
 - October 15, 2014
 - September 17, 2014
 - August 20, 2014
 - July 16, 2014
 - June 18, 2014
 - May 21, 2014
 - April 16, 2014
 - March 17 – 19, 2014
 - February 19, 2014
 - January 21, 2014
-

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 19, 2014**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Representative, W&I
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Tamika Bohler – Program Analyst, W&I
- Cedric Jeans – Acting Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP
- Betty Scott (Absent) – Program Analyst, W&I
- Rosemary Rixey – Policy Analyst, W&I
- Kim Vinci – Program Analyst, TAP

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell (Absent) – South Carolina
- Gretchen Cooney – Holstein, IA
- Francis Grinnan – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail (Absent) – Lindenhurst, NY
- Clark Powers – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette – Ozark, MO

- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Cedric Jeans introduced himself as the Program Manager detailed to TAP East. Jeans then declared the meeting opened.

Minutes

The minutes for October were approved by the full committee for posting.

National Office Report

Andrews thanked all the members for their commitment and dedication to the TAP; she also took a moment to single out those members rotating off of TAP for the uniqueness that they brought to TAP.

Andrews encouraged the members to join the call at 11 a.m. EST tomorrow for the virtual meeting on TAP's agenda for 2015.

The package for the new members has gone forward to the Department of Treasury for approval. Once the Department of Treasury approves the selections, the TAP staff will finalize the travel and agendas for the face to face meetings. TAP has not finalized the cities that will host the face to face meetings.

Chair Report

Halleman welcomed everyone to the call. This was the last full committee meeting for the year. Halleman thanked the member including those rotating off for their membership hard work and dedication to the Taxpayer Advocacy Panel.

Systemic Advocate Update

Birts provided an update on the SA report she stated the following:

The Annual Report to Congress process is moving into the home stretch. New for TAS are the Advocacy Initiative Teams. These teams are comprised of TAS Management and various organizations within TAS to solve problems that were once addressed by the Portfolio Process. For example there is a list of teams under Taxpayer Support and Education which has sub-teams for taxpayer services, special treatment, representation, and electronic communications. The teams will respond to inquiries from the National Taxpayer Advocate for their subjects, resolve issues and in some cases submit issues to the Systemic Advocacy Management System (SAMS).

Birts provided the weekly SAMS issue submission report figures below:

Week	Issues Received	External Submitter	Internal Submitter
10/26/14- 11/2/14	19	11	8 (All TAS employees)
11/2/14 - 1/8/14	20	9	11 (All TAS employees)
11/9-14 – 11/16/14	21	8	13 (All TAS employees)

Program Owner Report

Awalt thanked the outgoing members for their service and commitment to TAP for the last three years. She stated that her office is working on issues for the Toll Free Committee for 2015.

Mentoring

Armstrong and Powers mentioned that their mentees are very confident about their work and are doing very well.

Toll-Free Referral

Issue# 20443 Get it transcripts – the first three parts of the referral were rejected by the IRS; the fourth portion was accepted and will be adopted. Halleman and Rivera asked the members if they would like to rebuttal the portions rejected, they can send their remarks to Halleman by email. This will be placed on the face to face committee meeting agenda in January for a formal discussion.

Outreach Report

Mayer had a short discussion on the importance of outreach events. Halleman reported that there were 13 outreach events in the month of October with an audience of 368,490.

Thanks to all those who participated in those outreach events.

Public Participation

There were no members of the public present on this call.

Acknowledgment of those members rotating off of TAP

Grinnin thanked all the members for their service; he also singled out each retiring member and highlighted and gave accolades regarding their contributions to the Taxpayer Advocacy Panel.

Rivera thanked the retiring members for their contribution to Taxpayer Advocacy Panel.

Closing

Wells asked if anyone wants to publish an article in Alaska. Anyone wishing to do so can contact him for assistance in doing so.



Jeans asked the member to take the time to provide feedback on the Joint Committee Survey sent via email to all TAP members. He thanked the members for their dedication to the TAP.

This is the final meeting for 2014.

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 15, 2014**

IRS Staff

- Sheila Andrews (Absent) – TAP Director
- Debra Awalt – Program Representative
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts (Absent) – Senior Program Analyst, TAS
- Susan Jimerson – Program Manager
- Louis Morizio (Absent) – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP
- Rosemary Rixey – Policy Analyst, W&I
- Betty Scott – Program Analyst, W&I

TAP Members

- Kenneth, “Ken” Armstrong – Kalispell, MT
- Jerome Bell – North Carolina
- Gretchen Cooney – Holstein, IA
- Francis, “Frank” Grinnan – Rochester, NY
- Daniel, “Dan” Halleman (Absent) – Thornton, CO
- Lonnie Mayer (Absent) – Tripp, SD
- Boris Mikhail – Lindenhurst, NY
- Elizabeth Murphy-Adams (Absent) – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Grinnan the acting chair of the committee welcomed everyone to the teleconference meeting.

DFO Report

Rivera was the acting Designated Federal Officer; she declared the meeting opened.

National Office Report

Jimerson joined the meeting as the Acting Director for Andrews. She reported that the face to office meeting will be held the week of January 12, 2015.

Friday, October 17, 2014 is the deadline to vote for the TAP Chair and Vice Chair positions for 2015.

Minutes

The minutes for September were approved by the full committee for posting to www.improveirs.org.

Vice Chair Report

Grinnan reported that Issue# 26074 – (*Toll Free Phone Line Call Routing after Reduction in Services*) and Issue# 30443 – (*Get it Services*), has been sent to the JC for review.

Program Owner Report

Awalt welcomed the members. She stated there is nothing significant to report on from her office. However, she mentioned that things are a little slow except for yesterday; it was busy due to the deadline for filing extensions on tax returns. Awalt mentioned that the executives are reviewing and prioritizing the needs for fiscal year 2015.

Screening

Zachary mentioned that her subcommittee met on October 1, 2014; they had eight issues, three of which were about wait time. Two issues were placed in the parking lot, one will be worked and two other issues were dropped. The wait time issues were associated.

Mentoring

Armstrong has been in contact with his mentees and is pleased with their progress; they are holding their own very well. Grinnan stated that he had not spoken to Bell recently.

Outreach Report

Grinnan reported that there were five outreaches submitted for the month of September with an audience of 63,125; no issues were developed. Some members did not submit reports timely.

Grinnan discussed the complaints about the wait time for telephone assistance for tax professionals. Grinnan provided some feedback from his subcommittee that they would like to have the phones updated with the actual wait time to speak to a telephone assister or an option to leave the telephone number to receive a call back. Awalt also stated that perhaps TAP can invite a staff member from the Joint Operations Center to the next teleconference for a discussion about telephone wait times.

Public Participation

None.

Closing

Rivera stated that the staff is working on the Annual Regional Meeting training materials.

Grinnan thanked the members for joining the call and Rivera declared the meeting closed. The next teleconference will be on November 19, 2014, at 2:30 p.m. EST.

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 17, 2014**

IRS Staff

- Sheila Andrews (Absent) – TAP Director
- Debra Awalt – Program Representative
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts (Absent) – Senior Program Analyst, TAS
- Louis Morizio – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP
- Betty Scott (Absent) – Program Analyst, W&I
- Rosemary Rixey – Policy Analyst, W&I

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell (Absent) – South Carolina
- Gretchen Cooney – Holstein, IA
- Francis Grinnan (Absent) – Rochester, NY
- Dan Halleman (Absent) – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail (Absent) – Lindenhurst, NY
- Elizabeth Murphy-Adams (Absent) – Tacoma, WA
- Clark Powers – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette (Absent) – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Rivera welcomed everyone to the teleconference meeting.

Minutes

The minutes for August were approved by the full committee.

Chair Report

Rivera reported that Halleman is on sick leave. She stated that Grinnan will be the acting chair until Halleman is well and returns. Rivera stated that the quality review team draft was sent via email to the full committee. If the members are in agreement, then the draft will be placed on the Joint Committee (JC) meeting agenda for September 24, 2014.

Rivera introduced Rosemary Rixey to the members and staff, Policy Analyst for Wage and Investment. Rixey will be replacing Sherry Sneed.

DFO Report

Morzio stated the Affordable Care Act (ACA) information has been posted to TAPSpace for the members to take a look. Members are welcomed to talk about the ACA on their outreach events however; Morzio stated that members should not respond to detailed questions that may require technical expertise.

The Taxpayer Advocate Service (TAS) is asking TAP to help test a redesign of the online tool developed to help taxpayers estimate their Small Business Health Care Tax Credit. This estimator has been active for almost two years, with some of the major health insurers' link to it. TAS has updated the calculations for 2014, and would like TAP to review it before they launch this version of the tool. Taxpayer Advocate Services wants to ensure that the tool works properly and provides accurate results. TAS has listed a few questions for TAP and provided an email address to address their questions.

Regarding the tax check waivers for returning TAP members, Morzio reminded the members that it is imperative to return the forms to TAP as soon as possible.

Systemic Advocate Update

Birts was not present for this meeting however; she provided a report via email on the weekly SAMS submissions including trends in the reduction in services to taxpayers, long telephone wait time and tax fraud scams.

Program Owner Report

Awalt welcomed the members. She stated that her office is approaching the end of the tax filing season and beginning a new one in a few months. The office inventory is looking good. Wage & Investment is working on training employees on the ACA forms and questions for the influx of questions anticipated from taxpayers for the new filing season.

Subcommittee Report Out

Wells submitted 2 referrals (1) Get Transcripts Referral and, (2) Toll-Free Phone Line Call Routing after Reduction In Services- to the JC for approval.

Mentoring

Clarke Powers mentioned that his mentees are very confident about their work and are doing very well.

Armstrong mentioned that Halleman is doing a fine job. He has reached out to Cooney and she is doing great work as well.



Outreach Report

Mayer reported that there were 140 outreaches submitted for the month of August with an audience of 185,000; no issues were reported. Some of the audience numbers came from an article Wells published in an Alaskan newspaper. This article is also uploaded on a senior's website. The total readership is estimated at 2.3 million throughout Alaska.

Public Participation

There were no members of the public on this call.

Closing

Rivera reminded the members that it is imperative that the monthly reports be completed and sent in timely. Rivera thanked the members for joining the call and Morizio declared the meeting closed.

The next teleconference will be on October 15, 2014 at 2:30p.m. EST.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 20, 2014**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Representative
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Louis Morizio – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP
- Betty Scott – Program Analyst, W&I

TAP Members

- Ken Armstrong (Absent) – Kalispell, MT
- Jerome Bell (Absent) – South Carolina
- Gretchen Cooney – Holstein, IA
- Francis Grinnan – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail (Absent) – Lindenhurst, NY
- Elizabeth Murphy-Adams (Absent) Tacoma, WA
- Clark Powers – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Andrews welcomed everyone to the August teleconference and declared the meeting opened.

Chair Report

Halleman welcomed everyone to the teleconference. He asked the members if they had a chance to look at the Publication 5131 Post Card. This post card was sent out to taxpayers informing them the IRS will no longer prepare their tax returns. He asked members to volunteer to call the toll free number on the publication before the next meeting. The members will provide their zip codes to establish contact with their local TCE and Vita sites.



Halleman discussed the Joint Committee Face to Face meeting last week in Milwaukee, WI. The Toll Free meeting is now putting together the information for 2013 referrals and are preparing for 2014 proposals for the Project Committee Proposals.

The face to face regional meetings will be held the week of December 8, 2014. Those details are now being finalized. There will be more information available to members at the next monthly teleconference meeting.

DFO Report

Morizio stated the regional meetings will be held the week of December 8, 2014. Members will be given additional information at the next monthly teleconference. Morizio also provided an update on the Joint Committee's meeting in Milwaukee, WI.

National Office Update

Andrews welcomed everyone. She stated that the TAP's new Executive Director of Systemic Advocacy will be joining the meetings as soon as she is up to speed about the program. The selections for the TAP volunteers are now being reviewed by the National Taxpayer Advocate (NTA), and then on to the Department of Treasury for final selections.

The IRS Commissioner is visiting offices around the country discussing the budget cuts that are affecting the taxpayers and employees. Some employees have met with the commissioner and have communicated the need for increased budgetary spending to enable them to server the taxpayers more efficiently.

Systemic Advocate Update

Birts mentioned that her office has posted the June Report to Congress on the IRS Website. Systemic Advocacy is working on having taxpayers have one single point of contact from start to finish in order to resolve their ID Theft cases.

Program Owner Report

Awalt welcomed the members. She stated that the IRS has put out a news release on tax scammers that are contacting the public by telephone or e-mail to solicit money owed to the IRS. These taxpayers are being threatened with severe penalties and jail time. Awalt mentioned to the members that they can discuss the IRS' policy on collecting tax debts to help spread the word about these tax scams.

Awalt stated that her office is working on changing some of the taxpayers' notices for the next filing season. These forms will be simplified for the taxpayers and the telephone assistants to help the taxpayers.



The Practitioner Priority Service hot line may have a longer wait time than usual. Awalt stated that her office is doing the best they can with the reduction in staff to service those practitioners on the phone.

Subcommittee Report Out

Wells stated that Cooney submitted her referral form on Error Codes to her subcommittee with a copy to Rivera. Rivera also received Thomas' portion of the referral review. Bell's portion of the review was not submitted. Wells also stated that the policy in place for taxpayers to receive transcripts is working very well and so, there is no need for further review.

Grinnan's subcommittee team has completed the written referral on the reduction in services message. This referral is now being finalized by his subcommittee. Grinnan will send this referral to Rivera with the changes.

Zachary mentioned that her subcommittee had 5 issues. The members of her subcommittee have been responding to those submitters via SAMS that have provided contact information.

Outreach

Mayer discussed his outreach event where he spoke to taxpayers.

Toll free had 20 outreach events, with an audience of 830; there were no issues submitted.

Public Participation

There were no members of the public on this call.

Closing

Rivera reminded the members that it is imperative that the monthly reports be completed and sent in on a timely basis. A negative report is still expected to be completed. Halleman thanked the members for joining the call and Morizio declared the meeting closed.

The next teleconference will be on September 17, 2014, at 2:30 p.m. EST.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 16, 2014**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Representative
- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Louis Morizio – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell (Absent) – South Carolina
- Gretchen Cooney – Holstein, IA
- Francis Grinnan (Absent) – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail (Absent) – Lindenhurst, NY
- Elizabeth Murphy-Adams (Absent) – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette (Absent) – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Morizio welcomed everyone and declared the meeting opened.

Chair Report

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

Approval of the minutes

The minutes for June were approved for posting to www.improveirs.org.

DFO Report

Morizio mentioned the Tax Forms and Publication Committee request on Publication 179 *Circular, PR*. He asked the members for their assistance when they are conducting



outreach activities during July and August in the Latino communities. The TAP committees will ask the public if they are using Publication 179 and what they like about it, or why they do not use it.

National Office Update

Andrews welcomed everyone. She stated that the TAP's new Executive Director of Systemic Advocacy will be joining the meetings as soon as she is up to speed about the program. The selections for the TAP volunteers are now being reviewed by the National Taxpayer Advocate (NTA), and then on to the Department of Treasury for final selections. The IRS Commissioner is visiting offices around the country discussing the budget cuts that are affecting the taxpayers and employees from providing the services the taxpayers need. Some employees have met with the commissioner and have communicated the need for increased budgetary spending.

Systemic Advocate Update

Birts mentioned that the June Report to Congress has posted on the IRS Website. Her office works with the National Taxpayer Advocate and other staff to prepare the report. Systemic Advocacy is working with the IRS to have one single point of contact for ID Theft cases.

Program Owner Report

Sneed joined the call for Awalt who was absent, but she did not have anything new to report. Sneed is available to answer questions from the members.

Subcommittee Report Out

Wells encouraged his subcommittee teams to review their draft proposal and finalize the referral after adding, error code definitions.

Grinnan's subcommittee team is completing a written referral on the reduction in services message. They will be requesting that the toll-free message prompts be re-aligned.

Outreach

Zachary is working on an outreach survey on Reduction in Services, RIS. This survey will be given to the members to provide feedback from the general public, if this part of the project is feasible with all of the Toll-Free members.

Public Participation

There were no members of the public on this call.

Closing

Rivera reminded the members that it is imperative that the monthly reports be completed and sent in on a timely basis. A negative report is still expected to be completed.



Halleman thanked the members for joining the call and Morizio declared the meeting closed. The next teleconference will be on August 20, 2014 at 2:30 p.m. EST.

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 18, 2014**

IRS Staff

- Debra Awalt – Program Representative
- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Louis Morizio – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell – South Carolina
- Gretchen Cooney – Holstein, IA
- Francis Grinnan (Absent) – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail (Absent) – Lindenhurst, NY
- Elizabeth Murphy-Adams (Absent) – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette (Absent) – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Morizio and Andrews welcomed everyone to the meeting.

Chair Report

Halleman welcomed everyone and made a few announcements. He mentioned that the Toll Free Committee is in the process of putting together some additional subcommittees to make recommendations to the IRS. Halleman also stated that the Joint Committee has discussed following up with complaint submitters via TAP website and toll free lines. The JC is suggesting that the 5 committees adapt this procedure.

Approval of the minutes

The minutes for May were approved for posting to www.improveirs.org.

DFO Report

Morizio reported that the TAP recruitment interviews phase has wrapped up. The next step is to decide which members' names will go forward to the Treasury Department to join the panel beginning December 2014. Morizio expressed his appreciation for those members that participated in the interview process.

Morizio stated that the monthly teleconferences are opened and closed by the Designated Federal Officer (DFO) only. If he is absent, the assigned DFO will open and close the meeting. The DFO or acting DFO can make the decision if the meeting should be closed due to lack of quorum or other circumstances that can occur. No one else has that authority to do so. All TAP meetings announced in the Federal Register are open for public comments.

National Office Update

Andrews welcomed everyone and had a few announcements. The Executive Director of Systemic Advocacy, Rena Girinakis, has been promoted to the Deputy National Taxpayer Advocate. The new Executive Director of Systemic Advocacy will be Kim Stewart. Stewart has been with TAS for some time so the transition to EDSA will be quick. Stewart will be joining TAP meetings to introduce her, and will be invited to the Joint Committee Face to Face meeting in August. Both personnel changes are effective June 30, 2014.

The Annual Regional Planning Committee meeting will be held next Tuesday, June 24, 2014, facilitated by Otis Simpson, National Office Analyst. Andrews asked members for any suggestions they may have, which they can give to the analyst of their committee.

Andrews discussed the options of having one big meeting versus having regional face to face meetings. Members were also informed that the meetings must be held at an IRS office in the selected city. Washington DC is very expensive and so, that would probably not be an option for future meetings.

Systemic Advocate Update

Birts did not have much to report, but mentioned that her office has submitted the Annual Report to the National Taxpayer Advocate, Nina Olson, for review. Birts also stated that her office is in the process of reviewing internal management documents from the IRS manual.

Program Owner Update

Awalt welcomed all; she did not have anything new to report. However, Awalt stated that the telephone assistants are still taking calls and that Tele Tax Topics is available for taxpayers on the IRS website.

Screening Team

Zachary and the screening team reviewed 5 issues; one issue was kept for the Reduction in Service Subcommittee for further review.

Mentoring Team

The mentors are pleased with their mentees progress.

Publication 179

The Tax Forms and Publication Committee are trying to find out whether or not people are using Publication 179 in their area although it is meant mainly for the Latino/Hispanic Communities. It might be used mostly in states with high Hispanic populations, and probably by those members who are involved in the VITA/TCE Programs and Latino organizations. TAP/TFP is trying to find out if people like the publication or not or, if they find it useful. Since TAP is trying to collect as much information as possible, this project is being extended to the entire TAP.

Outreach Report

Mayor presented the outreach report. There were a total of 25 outreach events with an audience of 198 - 9 issues were discussed.

Rivera thanked the members for sending out their monthly reports timely.

Public Participation

There were no members on the public for this call.

Closing

Rivera reminded the members to review the list of issues via TAP Space that will be on the July meeting agenda.

Halleman thanked the members for joining the call. The next teleconference call will be on July 16, 2014 at 2:30 p.m. EST.

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 21, 2014**

IRS Staff

- Debra Awalt (Absent) – Program Representative
- Sheila Andrews (Absent) – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Louis Morizio – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP
- Sherri Sneed – Program Analyst, W&I

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell – Fayetteville, South Carolina
- Gretchen Cooney – Holstein, IA
- Francis Grinnan – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail (Absent) – Lindenhurst, NY
- Elizabeth Murphy-Adams (Absent) – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Thomas Ralph Thomas (Absent) – Webster, MA
- Keith Robinette – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Morizio and Andrews welcomed everyone to the meeting.

Chair Report

Halleman welcomed everyone and made a few announcements. He mentioned that the Toll Free Committee is in the process of putting together some additional subcommittees to make recommendations to the IRS. Halleman also mentioned that the Joint Committee has discussed following up with complaint submitters via TAP website and toll free lines. The JC is suggesting that the 5 committees adapt this procedure.

National Office Update

Andrews welcomed everyone. She mentioned that the recruitment period for potential applicants has started. This period started on May 19, 2014 and will end on June 13, 2014.



TAP Staff is asking for volunteers to assist with the interviews. If interested, panel members should contact TAP staff.

Tomorrow, May 22, 2014, there is a virtual meeting for all panel members; some great topics on the agenda – “Money Matters,” “Bit Coins” including trends in banking and checking will be discussed.

Marianne Dominguez will not be returning to TAP. She has joined Systemic Advocacy.

DFO Report

Rivera was the DFO for Morizio

Systemic Advocate Update

Birts did not have anything new to report. She mentioned that her office is working on the Annual Report to Congress and, is spending a lot of time on internal reviews.

Program Owner Analyst Update

Sneed reported that a news alert was sent to Rivera to share with the Toll Free Committee.

Rivera mentioned that Awalt has a VITA analyst. The analyst cannot attend the subcommittee meetings but may be able to attend the full committee meeting next month.

Mentoring Team

Grinnan mentioned that he is pleased with Bell’s progress and will touch base with him this week.

Armstrong stated that he hasn’t spoken to Cooney lately however, Halleman is doing fine.

Outreach Report

Rivera reported that for the month of April, there were 23 outreach activities with an audience of 178. Rivera also mentioned outreach has improved greatly. If members are unable to complete the spreadsheet accounting for their time, simply send their report to Rivera via email and she will input.

Survey Question

Toll-Free Committee will compile a specific survey for the general public, targeting specific groups such as the elderly, veterans, and low-income taxpayers. This survey will be made up of 2 or 3 questions dealing with the various groups getting the help they need. Rivera is looking for any comments suggestions or questions to complete the survey questionnaire. If the Toll-Free Committee agrees, then the Special Outreach will be planned with a third volunteer sub-committee heading the effort.



Wells can get the survey published in a newsletter dedicated to the senior population in his home state of Alaska.

Mayer stated that he can use local publications and get free publishing for TAP for the Survey.

Public Participation

There were no members from the public that attended this this call.

Closing

Halleman thanked the members for joining the call. The next teleconference call will be on June 18, 2014, at 2:30 p.m. EST.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 16, 2014**

IRS Staff

- Debra Awalt – Program Representative
- Sheila Andrews (Absent) – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts (Absent) – Senior Program Analyst, TAS
- Louis Morizio (Absent) – Program Manager, DFO
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- Gary Wells (Absent) – Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Rivera welcomed everyone and declared the meeting opened.

Chair Report

Halleman welcomed the members to the meeting.

Approval of the minutes

The minutes for March were not approved because quorum was not met so this will be an administrative meeting.

DFO Report

Acting Manager for Morizio, Lisa Billups was not present. Rivera was the DFO for this meeting.



National Office Update

The TAP Director was not present for this meeting.

Outreach Report

Mayor was not present for this meeting and so there was no report on outreach activities.

Public Participation

There were no members on the public for this call.

Closing

Rivera reminded the members to review their emails and notate their calendars for the monthly subcommittee and monthly teleconferences. Rivera will send out a follow-up email and updated calendar to the full committee as a reminder to join the monthly teleconferences.

Halleman thanked those members that signed on to the call. The next teleconference call will be on May 21, 2014 at 2:30 p.m. EST.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Face to Face Meeting Minutes
Jacksonville, Florida
March 17 – March 19, 2014**

IRS Staff

- Debra Awalt – Program Representative
- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Program Analyst, TAS
- Cindy Jones – Supervisor, W&I
- Deborah Momon-Townsend – Program Analyst, W&I
- Louis Morizio – Designated Federal Officer (DFO)
- Linda Rivera – Program Analyst, TAP
- Sherry Sneed – Program Analyst, W&I
- Betty Scott – Program Analyst, W&I

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell – North Carolina
- Laurie Chivers (Absent) – Dalton, MA
- Gretchen Cooney – Holstein, IA
- Francis Grinnan – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer (Absent) – Tripp, SD
- Boris Mikhail – Lindenhurst, NY
- Elizabeth Murphy-Adams – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Ralph Thomas (Absent) – Webster, MA
- Keith Robinette – Ozark, MO
- Dawn Welles – Milwaukee, WI
- Gary Wells– Anchorage, AK
- Martha Zachary – Inver Grove Heights, MN

Roll Call

Quorum was met for this meeting

Welcome/Announcement

Rivera and Morizio welcomed everyone to the face to face meeting. Morizio mentioned to the members that there will be a training class on March 19, 2014 for all members especially for the new people.



Andrews welcomed the members and thanked them for their commitment and dedication for the work they do as volunteers in the TAP.

The members and staff introduced themselves.

Chair of Committee Welcome

Halleman welcomed everyone to the 2013 Face to Face meeting. He mentioned that there is a lot to accomplish this year. IRS services will be drastically reduced after the filing season ends on April 15, 2014. There will be a reduction in services to taxpayers, the toll free lines website, and IRS employees will not receive any additional training to handle taxpayers issues. Halleman asked members to take a look at the Annual Report to Congress; the issues that he mentioned were part of the most serious problems.

Halleman referred to the April 15, 2014, issue- IRS will not allow tax law questions to be addressed on the toll free line or in the Taxpayer Assistance walk in centers. Halleman also spoke briefly on the consequences of the reduced services. He mentioned that the TAP members will take a look at how the TAP can ensure that the taxpayers are informed in a timely manner of these changes. Halleman stated that the objective is how to ensure that taxpayers are getting the message; this is a great area for outreach opportunities.

Projects and Expectations for 2014

Rivera mentioned that TAP will have to be innovative in presenting some ideas to the IRS. This will enable the taxpayers to get the resources to complete their tax returns. Many senior citizens do not have lap tops and the Volunteer Income Tax Assistance sites are not open all year round.

Snead spoke briefly on the changes in the services to the taxpayers. The IRS has moved employees from working the phones to working ID theft cases. By 2015, IRS is expecting the phones to be tied up with Obama Health Care questions. Snead also mentioned that her office is trying to do as much as they can with the limited resources they have. She asked the members for feedback on how the IRS can reach out to low income taxpayers.

Andrews stated that the IRS is working with us and at times, they do not know what TAP is asking for. Perhaps the issue and recommendations may need to be more defined.

Momon-Townsend stated that TAP needs to be more specific and detailed with what exactly they are asking for in their recommendations to the IRS.

Closing

Halleman closed the meeting and reminded the members that there will be an annual survey team. He asked for volunteers to use the links that will be sent via email from Morizio to take the survey. This survey is to assist TAP staff to improve the face to face meeting needs in the future.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Face to Face, Jacksonville, Florida
March 18, 2014**

Welcome

Halleman welcomed back the members.

Roll Call

We had the same attendance as on March 17, 2014.

Mentoring

Armstrong and Grinnan made a presentation on the importance of mentorship. Both stated that they are encouraging members to become mentors. It is helpful to get a mentor early. Some mentees mentioned that they are pleased with their mentors and feel very good about their progress.

Systemic Advocacy Presentation

Birts discussed a PowerPoint presentation via teleconference. She covered the role of her office Systemic Advocacy –how they address issues, the root causes and how they are corrected.

Outreach

The Vice Chair was not present at the meeting however, the Chair held a discussion on the topic. Halleman explained that as things progress, NTA, Olson can include outreach in her report to congress. TAP members responsibilities are to volunteer to reach out to taxpayers. Make the TAP presence known and communicate what the purpose is. Halleman also shared some of his experiences on how he conducts outreach activities with organizations that he is affiliated with. He asked members to get in touch with their Local Taxpayer Advocate, LTA and coordinate with them on outreach opportunities in their state of residence.

Morizio mentioned to members that they can write to the editor of a newspaper organization; if their letter gets published, that means TAP has reached as much as 10,000 taxpayers.

Rivera reminded members to review the outreach toolkit in TAP Space; there are lots of examples of effective methods of outreach. Rivera also mentioned that if members do not know who their LTAs are, she can assist them with making that connection.

Travel Reports

Morizio made a PowerPoint presentation on IRS travel rules and regulations. Members were also provided a copy of the presentation for their records.

Subcommittee Break Out Discussions

Get Transcripts – Murphy-Adams, Cooney, Wells and Robinette

Reduction in Services- Wells, Halleman, Zachary, Bell, Armstrong, Grinnan and Mikhail.

Wage & Investment

Program Owner Awalt held a discussion on a number of issues being handled by the Toll Free Committee. She mentioned that IRS has changed the wait time messages. The taxpayers will be told how long they will be on hold before a live assistor comes on the phone. Telephone calls are down this year this may be attributed to fewer calls coming in regarding Affordable Care Act. There is a reduced number of paper returns this year, the average refund going out to taxpayers is \$3,000.

W&I rolled out a new tool this year- IRS direct pay. This new tool is located in the IRS website. Taxpayers can make a direct payment to IRS instead of going through a third party. Credit cards are accepted as well. This reduces the number of paper checks and it allows employees to work on ID theft cases including other pressing issues.

W&I are closing lots of ID theft cases, and are trying to improve how the cases are processed – getting the right person their refund and ensure that they are communicating with the right persons.

Web services received \$165 million hits as of the end of February- taxpayers are using IRS.gov.

Closing

Halleman closed the meeting and thanked the members for their participation.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Face to Face, Jacksonville, Florida
March 19, 2014**

Welcome

Halleman welcomed back the members.

This portion of the face to face meeting session was a combination of TAC and the Toll Free Committee.

Overview of TAP/TAS

Morizio and Goldberg discussed the overview PowerPoint presentation. Morizio highlighted some key points- how to reach out to subject matter experts. Goldberg discussed the mission of TAP and its importance.

Outreach

Gross discussed outreach expectations and ideas for good outreach. Accounting Society Meetings, Stakeholder Liaisons, Talk Shows and Enrolled Agent Seminars.

Morizio stressed that it is imperative to provide closure to the taxpayers when performing outreach activities. TAP cannot make legislative changes and taxpayers should be referred to the appropriate sources.

Members broke out into groups to discuss some barriers to outreach.

Some feedback from the group discussions are:

1. Limited funding,
2. People's perception of the IRS
3. Lack of confidence in that nothing gets done.

Some solutions that were discussed are:

1. Making contacts throughout the state to set up outreach
2. Knowledge of TAP, members know what TAP can and cannot do.
3. Personalities, talk to people in plain language –do not with use acronyms.

Outreach Time Reporting Spreadsheet

Rivera and Powers discussed the spreadsheet and provided a PowerPoint presentation on how to complete the time spent and the location where outreach was done. Member's questions were addressed on the subject.

Issue Processing

Armstrong and Powers provided an overview on how the issues submitted by taxpayers are worked. Some of the responses from the IRS were reviewed as part of the presentation.

Working with your LTA

Halker made a presentation and explained his role as an LTA. He mentioned that part of his job is to work with the liaison offices, low income clinics TAP and other government liaisons. Halker informed members that they should speak to their LTAs and ask them what types of cases they are seeing.

There are lots of changes at TAS- very little money is available to do outreach; however, LTAs are required to visit all LITCs and Congressional Offices.

National Taxpayer Advocate

Olson thanked the members for their volunteer service to TAP. She discussed the changes in TAS services that will impact the taxpayers. Olson mentioned that this year, there were significant cuts, - reduction in walk-in sites and answering tax questions including various other cuts. These cuts she mentioned will severely impact the elderly and disabled.

Olson took questions from the panel members on how the budget cuts will impact taxpayers. She also discussed how the members can effectively do outreach to enable the taxpayers to find alternative sources for their tax needs. She stressed that the members can find a way from their perspective to assist taxpayers to begin trusting the tax system again.

Closing

Halleman closed the meeting and thanked the members for attending the meeting.

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
February 19, 2014**

IRS Staff

- Debra Awalt – Program Representative
- Sheila Andrews (Absent) – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Johnnie Beale – Senior Tax Analyst, W&I
- Tamara Birts – Program Analyst, TAS
- Michelle Burger – Senior Advisor, W&I
- Cindy Jones – Supervisor, W&I
- Deborah Momon-Townsend (Absent) – Program Analyst, W&I
- Louis Morizio – Designated Federal Officer (DFO)
- Linda Rivera – Program Analyst, TAP
- Betty Scott – Program Analyst, W&I

TAP Members

- Ken Armstrong – Kalispell, MT
- Jerome Bell – North Carolina
- Laurie Chivers (Absent) – Dalton, MA
- Gretchen Cooney – Holstein, IA
- Francis Grinnan – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer (Absent) – Tripp, SD
- Boris Mikhail – Lindenhurst, NY
- Elizabeth Murphy-Adams – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette – Ozark, MO
- Dawn Welles (Absent) – Milwaukee, WI
- Gary Wells (Absent) – Anchorage, AK
- Martha Zachary (Absent) – Inver Grove Heights, MN

Welcome/Announcement

Morizio and Rivera welcomed everyone to the meeting.

Chair Report

Halleman welcomed everyone and made a few announcements. TAP is now finalizing the travel arrangements for the Toll Free Face to Face meeting in Jacksonville, Florida. Members should contact Babb about their travel arrangements if they have not done so yet.

At the Joint Committee meeting last week, there were several discussions regarding the TAP's 2012 Annual Report. The report should be completed by March 4, 2014 and then sent out by March 13, 2014. It has not yet been determined whether a hard/ electronic copy will be sent to the committee members. An electronic copy will be placed in TAP Space.

DFO Report

Morizio mentioned that the face to face meeting in Jacksonville will start on March 17, 2014, at 1 p.m. EST. He also informed members that airline ticket prices may be cheaper if not purchased with SATO; however, those tickets purchases through SATO are fully refundable unlike outside purchases.

Systemic Advocate Update

Birts provided an update of ID theft cases in Systemic Advocacy.

Program Owner Analyst Update

Awalt mentioned that this year's filing season has gotten off to a good start.

Status on Toll Free inventory of Issues

Rivera provided an update on the list of issues in the Toll Free inventory. Some issues will be worked, while some were recommended to be dropped. Some issues required more information and members agreed to contact the issue submitters.

Mentoring Team

Armstrong stated that Halleman and Cooney are doing well.

Grinnan mentioned that he talked to Robinette and that he is pleased with his progress. Bell will be contacted by Grinnan for any assistance he needs.

Murphy-Adams stated that Powers reached out to her and was of great help.

Outreach Report

Halleman mentioned that there were 14 outreach activities with an audience of 521 taxpayers and nine new issues were identified. Even if there are no outreach activities, Halleman asked members to indicate that on their monthly spreadsheet report.

Public Participation

Mike Christoff, a tax practitioner from Colorado joined the call as a member of the public.

Closing

Halleman thanked the members for joining the call.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
January 21, 2014**

IRS Staff

- Debra Awalt (Absent) – Program Owner
- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Johnnie Beale – Senior Tax Analyst, W&I
- Tamara Birts – Program Analyst, TAS
- Michelle Burger – Senior Advisor, W&I
- Cindy Jones – Supervisor, W & I
- Deborah Momon-Townsend – Program Analyst, W&I
- Louis Morizio – Designated Federal Officer (DFO)
- Linda Rivera – Program Analyst, TAP
- Betty Scott – Program Analyst, W&I

TAP Members

- Stephen Allen – Charlotte, NC
- Ken Armstrong – Kalispell, MT
- Laurie Chivers (Absent) – Dalton, MA
- Gretchen Cooney – Holstein, IA
- Francis Grinnan – Rochester, NY
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Boris Mikhail – Lindenhurst, NY
- Elizabeth Murphy-Adams – Tacoma, WA
- Clark Powers (Absent) – Warrenton, OR
- Ralph Thomas – Webster, MA
- Keith Robinette – Ozark, MO
- Dawn Welles (Absent) – Milwaukee, WI
- Martha Zachary – Inver Grove Heights, MN

Welcome/Announcement

Morizio welcomed everyone to the first teleconference of 2014 as the DFO for the Toll Free Teleconferences. Outgoing Chair of Toll Free Committee 2013, Armstrong also welcomed everyone. Armstrong asked that members keep in mind the TAP Mission, and attend all meetings including subcommittee calls.

DFO Report

Morizio introduced his staff and informed the members of the upcoming Annual Regional Annual Meeting. An email from the TAP Director covered the dates, venue and times of the meeting in Jacksonville, Florida.

Morizio briefly touched on the importance of members conducting outreach and explained how the members can account for outreach activities. A spreadsheet will be sent out via email to all committee members by Rivera.

TAP Director

Andrews welcomed the members and thanked them for volunteering their service to TAP.

Program Owner Office

The Program Office staff introduced themselves and provided an overview of their functions as it relates to TAP work.

Chair and Vice Chair Elections

Halleman was elected Chair and Mayer was elected Vice Chair. The Vice Chair of the project committee is also in charge of outreach activities. Mayer represents the committee by providing a brief report on outreach at each monthly teleconference. Outreach can be formal or informal, so members should refer to their handbook for more details.

Systemic Advocate Update

Birts introduced herself as the Systemic Advocacy (SA) analyst assigned to the committee; she provided an overview of her SA work in relation to TAP program.

Committee Structure

Rivera covered the following:

- Quorum will be 50% plus one to make decisions at the committee teleconferences; for this committee that is 8 members. If a member resigns, the quorum will be revised.
- During all teleconferences, members are asked to mute their phones – *6 to mute and *6 to unmute. This is especially helpful to filter out distractions when your fellow panel member or staff is speaking.
- A Quality Review Team, QR was formed to review referrals/proposals and to ensure that they are free of syntax and grammatical errors. Formatting will be reviewed as well. Halleman, Grinnan, Ralph and Cooney have volunteered to be on the QR team.
- The Toll Free Project Committee has elected to hold their meetings via teleconferences on the third Wednesday of each month at 2:30 p.m. EST. The next meeting will be held on February 19, 2014 at 2:30 p.m.
- Members should include Morizio on all emails when sending emails to Rivera in the event she is on leave.



Two Subcommittees were formed to work the following issues:

Team – 1 (FASFA) Get Transcripts IRS Reduction in Service

Murphy-Adams	Armstrong
Powers	Mikhail
Cooney	Grinnan
Robinette	Wells
Allen	Zachary
Ralph	Halleman
Chivers	Mayer
	Welles

New members of TAP are assigned mentors to assist them in their transition:

- Halleman and Cooney has been assigned to Armstrong
- Robinette and Allen has been assigned to Grinnan
- Mayer and Murphy Adams has been be assigned to Powers

Public Participation

There were no members of the public on the teleconference.

Face to Face Meeting

The dates of the meeting are March 17-19, 2014 with the afternoon of March 17, 2014 the members will meet from 1 p.m. to 4:30 p.m. Tuesday and Wednesday will be full days of training in conjunction with the TAC committee. Travel home will be Thursday, March 20, 2014.

Closing

Armstrong thanked the members for joining the call.

Rivera will send out a copy of the monthly teleconferences schedule and subcommittee meeting dates to the members.

Members can refer to their TAP Handbook for further information on TAP.