



Toll-Free Phone Line Project Committee Meeting Minutes

- November 16, 2016
 - October 19, 2016
 - September 14, 2016
 - August 24, 2016
 - July 20, 2016
 - June 15, 2016
 - May 18, 2016
 - April 20, 2016
 - March 23, 2016
 - February 29 – March 1, 2016
-

Toll-Free Phone Line Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes November 16, 2016

IRS Staff

- Sheila Andrews, Director – TAP (Absent)
- Debra Awalt, – Program Analyst, W&I
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I (Absent)
- Tamara Birts, Senior Program Analyst – TAS
- Saul Hernandez, Supv Mgt & Program Analyst – TAS
- Cedric Jeans, Designated Federal Official
- Linda Rivera, Senior Program Analyst – TAP
- Rosemary Rixey, Policy Analyst, W&I

TAP Members

- Timothy Bolin – Cheyenne, WY
- Gretchen Cooney – Holstein, IA
- Felicia Horton – Lexington, KY
- Ashley Hunter – Austin, TX (Absent)
- David Jones – Hickory Creek, TX
- Sean McPhilamy – Talkeetna, AK (Absent)
- Joan Ogden – Salt Lake City, UT
- Blake Parke – Sioux Falls, SD
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)



- Juliana Weeks – Blythewood, SC

Opening

Jeans declared the meeting opened and welcomed all. This is the last meeting for 2016.

Welcome/Announcements

Ogden opened the meeting for McPhilamy who was absent for this meeting.

Approval of the Minutes

The minutes for October were approved for posting to www.improveirs.org. Quorum was met for this meeting.

National Office Report, (NOR)

Andrews expressed her appreciation for the work members have done in the committees all year. She also thanked Cooney and Robinette, third year residents rotating off of the TAP for their dedication, mentorship and the assignments that they have also volunteered for.

Andrews informed the members that the Joint Committee (JC) has decided to adjust the face-to-face meeting schedule. Previously the FTF has been scheduled for the second week of January. With some scheduling conflicts of the tax season for 2017, the JC is moving the date to the second week of January. As a reminder, Andrews stated that these meetings go through levels of approvals – the Department of Treasury gives the final approval. The members will receive correspondence via email on the final date.

A cost analyst is usually done to compare the cities that are priced most affordable and the weather conditions are generally favorable.

Andrews mentioned the new National Chair Christensen and Vice Chair Mullins Thompson; they are eager to continue the TAP work in their new roles.

Jeans mentioned that since this is the last meeting of the year for this committee, he is encouraging the third year rotating members to complete the Annual Survey. This survey will be sent out by November 22, 2017 and is due back within 10 days to the TAP Staff.

Jeans thanked all the members of this committee for their work; he expressed his appreciation to Cooney and Robinette – third year members that are rotating off of the TAP Panel; he also ask the members to strongly continue with their outreach events especially those grass root issues to bring to the TAP.

Chair Report



Ogden conveyed a message on behalf of McPhilamy expressing his appreciation to the entire committee and the valuable work they have done all year. Ogden’s note from McPhilamy also mentions the online WebEx software is now a great improvement process.

Systemic Advocacy (SA) Analyst Report

Birts provided the following report:

Week	Issues received	External Submitters	Internal Submitters
10/16/2016 – 10/23/2016	15	4 (Attorney 2, Taxpayers 2)	11 (11 TAS employees)
10/23/2016 – 10/29/2016	17	8 (LITC 1, Practitioner 1, Taxpayer 5, Other 1)	9 (7 TAS employees, 2 W&I employees employee)
10/30/2016 – 11/6/2016	22	10 (Practitioners 4, Taxpayers 3, Other 1, LITC 1, TAP 1)	12 (12 TAS employees)

Keep in mind the issues are recent submissions and the review team has not determined if any of them will be assigned to a systemic advocacy employee at this time.

Toll Free and Access Issues

An old issue resurfaced and is lack of toll free access to taxpayers living outside of the United States. This issue has been reviewed over the years and the final answer has not changed. Basically in this time of very limited budget there are no plans to expand phone access. The National Taxpayer Advocate (NTA) has addressed issues with access for taxpayers abroad over the years, most recently in 2011.

We received two issues where the TACs closed due to emergency staff out of office situations without notifying the public and without notifying those taxpayers that had appointment. The submitters stated there should have been proper



notification. Without knowing how the appointments are tracked and where that information is kept a solution is not readily available.

We received a few issues about TAC offices not accepting credit card payments, and directing taxpayers to online options or even the phone lines. Anytime a taxpayer wants to make a payment it would be nice if the IRS could accept them. However, there are online only payments such as quarterly payments so this is something that is not a one size fits all item and there was not enough detail in the submission to determine if the refusal to accept the payment was proper.

Signage at TACs needs to be improved, specifically it should say what services are available, what to do if you don't want to wait, how to obtain an appointment, etc. A friend of the NTA stated at one site the security guard was turning people away so signage would be a good addition to the sites. As always, this would be a budget driven item and at this time we don't know what is in the works by the IRS.

Other

I encourage all of you to review the Advocate's page on the irs.gov website located at www.irs.gov/advocate. The site has helpful tips, upcoming conferences, the NTA Annual Reports to Congress, and NTA Testimony before Congress plus other information.

Finally, internally we have a crosswalk of all NTA Annual Reports to Congress and June Objectives report to congress for all years so if you have a topic and you want to know how it's been covered in the past I can provide that information to you, so that you won't have to do extensive research, just go through the usual channels to get the request over to me.

Program Owner Report

Bohler did not have anything new to report; however, she mentioned that her office delivered the final 2017 assignments to the TAP Director. These assignments have been approved by the IRS for the TAP members to review and work.

Bohler thanked the panel members including those rotating off for their work helping the IRS to improve taxpayers' service.

Screening Report

Rivera reported that the screening committee did not meet this week however; the committee will meet next Monday. As of today, there are seven issues to be reviewed.

Activity Reports



Ogden stated that for the month of October, there were 28.5 hours of outreach with a total of 1,722 hours logged since December 2015. Ogden mentioned that Persons' Outreach this year has reached 15,000 taxpayers.

Subcommittee Report Out – 1

Subcommittee Report Out – 2

Acknowledgements to Members

Jeans thanked Ogden for her work in the committee and especially for keeping the committee on track with assignments.

Rivera thanked Cooney and Keith for their work and the responsibilities; she stated that their contributions are invaluable.

Rivera thanked the TAP Staff, and other IRS Staff, Awalt, Birts, Beal, Bohler, Jones and Rixey for making TAP a very successful year.

Action Items

There were no action items for this meeting.

Closing

Jeans, DFO thanked the members for joining the call and declared the meeting officially closed. This was the last official meeting for 2016

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 19, 2016**

IRS Staff

- Sheila Andrews, Director – TAP (Absent)
- Debra Awalt, – Program Analyst, W&I
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I
- Tamara Birts, Senior Program Analyst – TAS
- Cedric Jeans, Designated Federal Official
- Deborah A. Quirk, Senior Tax Analyst. W&I
- Linda Rivera, Senior Program Analyst – TAP

TAP Members

- Timothy Bolin – Cheyenne, WY
- Gretchen Cooney – Holstein, IA
- Felicia Horton – Lexington, KY (Absent)
- Ashley Hunter – Austin, TX (Absent)
- David Jones – Hickory Creek, TX
- Sean McPhilamy – Talkeetna, AK
- Joan Ogden – Salt Lake City, UT
- Blake Parke – Sioux Falls, SD
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)
- Juliana Weeks – Blythewood, SC

Opening

Jeans declared the meeting opened and welcomed all.

Welcome/Announcements

McPhilamy welcomed all and proceeded with the agenda.

Approval of the Minutes

The minutes for August and September were approved for posting to www.improveirs.org. Quorum was met for this meeting.

National Office Report, (NOR)

Jeans stated that there is one more meeting for the TAP year before we begin working on the 2017 TAP year. Jeans informed the members that an email will be sent to them next week to solicit their first, second or third choice of committee for next year. Members should keep in mind that there are five



committees to choose from and that they can also choose to remain on their current committee as well.

The recruitment package has been sent to the National Taxpayer Advocate (NTA), Nina Olson for approval. Subsequent to the NTA’s approval, the package will be sent to the Treasury Department for final approval of the new members appointments to the panel.

This is the end of year for TAP, Jeans asked the members if there are any concerns or grass root issues that they would want to work on. If members have suggestions for projects, please feel free to send them to Rivera.

Chair Report

McPhilamy welcomed all to the call and mentioned that the Toll Free has one more call before the end of the TAP year.

Systemic Advocacy (SA) Analyst Report

Birts provided the following report:

Week	Issues received	External Submitters	Internal Submitters
9/18/2016 – 9/25/2016	26	13 (Attorney 2, LITC 6, Practitioners 3, Taxpayers 2)	14 (13 TAS employees, 1 W&I employee)
9/25/2016 – 10/2/2016	19	6 (LITC 2, Practitioner 3, TAP 1)	13 (11 TAS employees, 2 W&I employees employee)
10/2/2016 – 10/9/2016	21	11 (Attorney 1, LITC 2, Practitioners 0, Taxpayers 7, Other 0, External IRS EE 1)	11 (10 TAS employees, 1 W&I employee)
10/9/2016 - 10/16/2016	13	4 (Attorney 0, LITC 3, Practitioners 0, Taxpayers 1, Other 0, External IRS EE 0)	9 TAS employees

Toll Free And Access Issues

No access issues this month. The issues received had great variety and dealt with Power of Attorney (POA) issues, Affordable Care Act (ACA), correspondence, Automated Collection System, Integrity & Verification Operations, etc.

Other

- TAP members can check the advocate’s page on www.irs.gov/advocate to find out what is trending in TAS. Currently there is a message about the



- new email scam which is using fake IRS notices to solicit ACA payments, and one of three ways the Premium Tax Credit can lower your tax bill.
- The Annual Report to Congress Report Card for 2014 is now available on the irs.gov/advocate website.
- New IRS Congressional District Liaison group created.

Beginning on October 3, 2016, all congressional offices will be served by eight IRS employees located throughout the country. These employees will be called IRS Congressional District Liaisons (DLs), and will report directly to IRS Legislative Affairs. Four Governmental Liaisons (GLs) will move over from Privacy, Governmental Liaison, GL and Disclosure (PGLD), along with others who will be detailed into the remaining four positions until the new positions can be filled. The new DLs will spend 100 percent of their time on congressional activities formerly conducted by GLs, who typically spent 21 percent of their time on congressional activities. Legislative Affairs plans to expand the cadre to 10 positions sometime in the second quarter of FY2017. For now, the states are divided into eight areas which are based on the number of congressional members per state. In most cases, the new or acting DL resides in one of the states they now serve. The [Congressional page](#) has been updated to include the TAS Congressional District alignment, including DL and GL contacts, and the [DL map](#).

Program Owner Report

Debbie Quirk from the Joint Operations Center joined the call as a subject matter expert. She discussed the functions of her office with regard to monitoring and maintaining the toll free lines used frequently by taxpayers. Quirk provided a breakdown of the process via the toll free line that taxpayers navigate before the calls are picked up by telephone assistants. The members asked specific questions regarding primary and secondary calls being tracked.

Awalt stated that answering more calls are tied into the IRS funding and that her office is trying to get the taxpayers to go to www.IRS.gov for some services like tax refunds.

Screening Report

Rivera reported that there were no issues in the screening database and that the screening committee did not meet this month. As of today, there are five new issues in the database and it will be screened before the full committee meeting in November.

Activity Reports

Ogden stated that for the month of September, Persons conducted an outstanding outreach by coordinating with the Municipal Credit Union banks in the New York City area to include the TAP handout in their customer mailings. The mailing has the capacity to reach over 40,000 recipients. Ogden mentioned



to members the importance of submitting the activity reports especially for those members rotating off of TAP this year.

Subcommittee Report Out – 1

Jones reported that his subcommittee had a meeting today; they discussed the Public Service Announcements referral. The feedback received from the attorney adviser with edits was incorporated into his final draft of the referral. This new draft will be reviewed by the Quality Review team and then sent to Rivera to place on www.TAPSpace.org to be reviewed by the full committee. On the next full committee this referral will be voted on and sent to the Joint Committee's agenda for November.

Beale stated that customer care has been in the budget process since 2014 and that his office has been working on it since 2012 as a priority.

Subcommittee Report Out – 2

Ogden stated that her subcommittee had a good discussion. The subcommittee discussed the customer call back referral recommendations that were rejected. Jeans stated that a write up narrative might be able to go into the Annual Report.

Round Table

Rivera opened up the roundtable to entertain questions. There were no additional discussions at that time.

Action Items

- Rivera will share Awalt's email on four new topics for January 2017 with the members today.
- Members will work on finishing project referrals by the last meeting scheduled for November 17, 2016.

Closing

McPhilamy thanked Jones and Persons for their exceptional outreach activities and he also thanked Cooney and Robinette for their exceptional work as mentors.

Jeans thanked the members for joining the call and declared the meeting officially closed.

**Next Scheduled Meeting: Wednesday, November 16, 2016, at 2:30 p.m. EST.
1-888-331-8226 Access Code 8017262**

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 14, 2016**

IRS Staff

- Sheila Andrews, Director – TAP (Absent)
- Debra Awalt, – Program Analyst, W&I (Absent)
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I
- Tamara Birts, Senior Program Analyst – TAS
- Cedric Jeans, Designated Federal Official
- Rivera, Linda, Senior Program Analyst – TAP

TAP Members

- Timothy Bolin, Cheyenne, WY (Absent)
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY (Absent)
- Ashley Hunter, Austin, TX (Absent)
- David Jones, Hickory Creek, TX (Absent)
- Sean McPhilamy, Talkeetna, AK (Absent)
- Joan Ogden, Salt Lake City, UT
- Blake Parke, Sioux Falls, SD (Absent)
- Daniel Persons, Brooklyn, NY
- Keith Robinette, Ozark, MO
- Juliana Weeks, Blythewood, SC

Opening

Rivera declared the meeting opened and welcomed all.

Welcome/Announcements

Ogden welcomed all and proceeded with the agenda.

Approval of the Minutes

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

National Office Report, (NOR)

Rivera was the DFO for Jeans who joined the call later. She provided a brief National Office report. The recruitment process is over and the TAP staff is now working on finalizing the selections to submit to the TAP Director. Subsequent to the TAP Director, this list goes to the National Taxpayer Advocate and then to the Department of Treasury for final approval of the selections.



Chair Report

Rivera reported for McPhilamy; she asked members to take a look at the TAP Newsletter. McPhilamy wrote an article on behalf of the Toll-Free Committee, she mentioned that members can learn from the article what other committees are working on.

Systemic Advocacy (SA) Analyst Report

Week	Issues received	External Submitter	Internal Submitter
8/21/2016 – 8/28/2016	25	17 (6 LITC, 7 Practitioners, 4 Taxpayers)	7 TAS employees, 1 C&L
8/28/2016 – 9/4/2016	15	20 (7 LITC, 2 Practitioners, 2 Taxpayers)	3 TAS employees, 1 IRS employee
9/4/2016 – 9/11/2016	16	9 (1 Attorney, 5 LITC, 1 Practitioner, 2 Taxpayers)	7 TAS employees

Toll-Free and Access Issues

A practitioner called with three cases to resolve. The practitioner started in the morning and experienced four courtesy hang up messages which stated “We're sorry but due to the high volume of calls please call back later or another business day.” The caller was able to reach someone late afternoon after an extended wait of about two hours. The caller was then transferred to Automated Collection System (ACS) which is the number originally called. After another extended wait the call was answered. The worker handled the case well but then refused to discuss another case. The caller asked to speak to a manager and was told the manager would call back within 24 hours. The manager called back and told the caller it is a rule that only one case per call be taken by ACS workers.

IRM 21.1.1.7 (10-01-2016) – Communication Skills pulled from www.irs.gov/irm/part21/irm_21-001-001.html#d0e770

States in part under 9. F. Taxpayers may contact the Service requesting information on their accounts. CSRs will limit the taxpayer to one account per call, not tax year/period.

Note: The Practitioner Priority Service (PPS) line, which limits callers to five clients per call, is available for tax practitioners calling with account issues.

The National Taxpayer Advocate released Volume 2 of the FY 2017 Objectives Report to Congress which is accessible at www.irs.gov/advocate.



The National Taxpayer Advocate held the last of the Public Forums in San Antonio Texas on August 30, 2016 on what taxpayers want and need from the IRS to comply with their tax obligations. A brief article of what was discussed and a list of the presenters and their written statements are accessible at www.irs.gov/advocate.

Program Owner Report

Beale was present on behalf of Bohler; he did not have anything new to report.

Screening Report

The screening committee did not meet this month because there were no issues to screen.

Activity Reports

Ogden stated that there were 19 hours of TAP work per person per month. There were two hours a month in TAP Out Reach and 109 people per event with an audience of 13,000. Persons accounted for 37 percent of all Out Reach events in August. There were 15 issues received.

Persons mentioned that next week he will have a meeting with the Municipal Credit Union; he indicated that he may need some assistance with possible technical questions.

Subcommittee Report Out – 1

This subcommittee worked on the last part of the referral on Public Service Announcement today. The referral will now be sent to the Quality Review Team and subsequent to an attorney advisor before putting on the Joint Committee (JC) calendar for October.

Subcommittee Report Out – 2

Subcommittee 2 will prepare a rebuttal on Issue# 33524 and the 13 recommendations that were rejected by the IRS. The authentication Retention referral will be resubmitted to the JC agenda for this month. Beale reminded us that the allocation for this project has been in the IRS Budget since 2014. The Authentication retention Referral has been re-submitted to the JC for approval for September.

2017 Project Proposals

The full committee is proposing to review the transcript to be used with the new phone line regarding the Affordable Care Act transcript line.

Round Table

Rivera opened up the roundtable to entertain questions. There were no additional discussions at that time.



Action Items

1. If you are planning a meet and greet outreach event, you must provide Rivera with the information on the event.
2. Rivera will post Next door.com article submitted by Ogden (for TAP members utilize to represent their areas) on TAP Space.

Closing

Rivera thanked the members for joining call and declared the meeting closed.

Next Scheduled Meeting: Wednesday, October 19, 2016, at 2:30 p.m. EST.
1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 24, 2016**

IRS Staff

- Sheila Andrews, Director – TAP (Absent)
- Debra Awalt, Program Analyst – W&I
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I (Absent)
- Tamara Birts, Senior Program Analyst
- Cedric Jeans, Program Manager – TAP (Absent)
- Rivera, Linda, Senior Program Analyst –TAP
- Donna Powers, Program Analyst – TAP
- Rosemary Rixey, W&I CAS
- Tamikio Bohler, Senior Analyst – W&I

TAP Members

- Timothy Bolin, Cheyenne, WY
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY (Absent)
- Ashley Hunter, Austin, TX (Absent)
- David Jones, Hickory Creek, TX
- Sean McPhilamy, Talkeetna, AK
- Joan Ogden, Salt Lake City, UT
- Blake Parke, Sioux Falls, SD (Absent)
- Daniel Persons, Brooklyn, NY
- Keith Robinette, Ozark, MO (Absent)
- Juliana Weeks, Blythewood, SC

Opening

Powers was the acting Designated Federal Official for Jeans. She declared the meeting opened and welcomed all.

Welcome/Announcements

McPhilamy welcomed all and proceeded with the agenda.

Approval of the Minutes

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

National Office Report (NOR)

Andrews reported that things are going well with regard to recruitment. TAP is almost done. Subsequently, there will be a meeting to discuss recommendations



for appointments to the panel. This process goes through the National Taxpayer Advocate (NTA), Nina Olson, and then the treasury secretary’s office approves the appointments suggested by TAP.

It is suggested that the referrals being worked on by the Toll-Free Committee be pushed through to the Joint Committee (JC) as soon as possible. There are two more meetings for the remainder of the year.

Chair Report

McPhilamy provided a brief overview of the JC Virtual meeting held on (August 16-August 18, 2016). There will be some minor changes to be made to the Activity Report Spreadsheet. A webpage is being developed with some new formatting to enable the members to work more efficiently.

Systemic Advocacy Analyst Report

Birts presented the following report:

Week	Issues received	External Submitter	Internal Submitter
7/31/2016 – 8/7/2016	24	17 (Attorney 1, LITC 6, PR actioners 6, Taxpayers 4)	7 TAS employees
8/7/2016 – 8/14/2016	35	20 (LITC 7, PR actioner 9, Taxpayer 2, Other 2)	13 TAS employees, 2 Communication & Liaison employee
8/14/2016 – 8/22/2016	29	20 (Attorney 1, LITC 7, PR actioners 1, Taxpayers 6, Other 5)	8 TAS employees, 1 W&I employee

Toll-Free And Access Issues

An issue was received on the Systemic Advocacy Management Systems (SAMS) system which stated, “We are receiving multiple calls from taxpayers complaining that the Taxpayer Assistance Centers (TAC) do not provide tax return transcripts. The taxpayers have been unable to get the transcripts via IRS on line services for various reasons, and the taxpayers need these transcripts for school, mortgage companies and for BP Oil Claims. The taxpayers are calling TAS for assistance in getting their transcripts. The TAC Territory Manager and some of the Group Managers stated that the taxpayers can get transcripts in the TAC office, but there are still complaints from taxpayers.

“It would have been helpful to know which TAC’s are refusing to provide transcripts. Birts pulled up the TAC closest near her home and reviewed the webpage. The list of services provided (cut & pasted below) does not include transcripts. The problem can be corrected by requesting the IRS update the webpage for all TAC’s and educate the employees that work in the TAC’s. This may also be a downstream consequence of the ‘Get Transcripts’ application



being available again, however passing authentication can be challenging so taxpayers continue to need an alternative.”

Debbie Awalt of Wage & Investment (W&I) inquired if the taxpayers had an appointment prior to trying to obtain a transcript from the TAC’s. Birts was not sure as she hadn’t spoken to the submitter, however if the taxpayer checked the www.irs.gov website he or she would have been aware of the need for appointments prior to going to a TAC.

Services Provided

- **Account inquiries (*help with letters, notices and levies on your wages or bank account*)**
- **Adjustments (*changes to tax account information or payments*)**
- **Alien clearances (*Sailing Permits*)**
- **Assistance with Affordable Care Act tax provision questions for individuals**
- **Basic tax law assistance January 1 – April 15 (*answers related to your individual Federal Tax Return*) (Topics)**
- **Form 911, Request for Taxpayer Advocate Service Assistance**
- **Form 2290, Heavy Highway Vehicle Use Tax Return (*submission of tax return if unable to e-file*)**
- **Individual Taxpayer Identification Numbers and Form W-7 (More Information)**
- **Multilingual assistance (*over 150 languages translated*)**
- **Payment arrangements**
- **Payments (*check or money order only*)**
- **Procedural inquiries**
- **Solutions to tax issues**
- **Tax forms (*based on availability*)**

****Does not accept cash payments***

TAS received more than one issue regarding the lengthy time it takes to get an appointment with the TACs. One of the submitters was a practitioner who stated he or she was on the phone for 30 minutes only to be told he or she could not make an appointment without a Form 2848, *Power of Attorney and Declaration of Representative* on file. The submitter felt an appointment should only take about seven minutes, however due to the heavy call volume there is little the IRS can do to improve hold times without additional funding for staffing. On the www.irs.gov webpage under telephone assistance it does state the representative needs to have a valid Form 2848 on file. Birts placed calls to the local office located in Landover, MD and was directed to check www.irs.gov for a



list of services and the taxpayers wanted appointments, they would have to call (844) 545-5640.

Other

National Taxpayer Advocate, Nina E. Olson and Rep. Lloyd Doggett, a member of the House Committee on Ways and Means and the ranking member of its Subcommittee on Human Resources, will hold a public forum to discuss what taxpayers want and need from the IRS to comply with their tax obligations.

The public forum will be held on Tuesday, August 30, 2016, at 8:30 a.m. local time at the Maestro Entrepreneur Center, San Antonio, Texas. Members of the public and the media are invited to attend.

Program Owner Report

Bohler did not have a presentation however; she informed the members that her office is working on some potential topics for TAP to work on. Awalt informed members that she can provide a Joint Operations specialist to join the September call to discuss "How to get Data". She also mentioned that there will be changes in refunds processing due to ID theft.

Screening Report

Rivera provided the screening report:

There were 13 issues reviewed and closed:

1. Six issues were associated with them;
2. There were three internal issues handled by the IRS employee complaints;
3. One was transfer to Notices and Correspondence Project Committee;
4. Two were dropped and;
5. One is being looked at to associate with the IRS referral.

Activity Reports

Ogden provided the activity report:

There were 1260 hours of participation, 122 hours of Outreach and there were 14 outreach events completed in July.

Ogden reminded the members that their monthly spreadsheet is due on August 25, 2016.

Subcommittee Report Out – 1

A first draft of the Public Service Announcements (PSA) referral has gone to Quality Review and then it will be submitted to the attorney advisors for review.

Subcommittee Report Out – 2

The Authentication Retention referral is completed and ready to re-submit to the JC for approval. The additional footnotes will be removed from the document.



Action Items

3. Rivera will send a calendar reminder to the members – the September meeting has been moved to September 14, 2016, to accommodate the Analyst Meeting.

4. Rivera will contact Kim Vinci to assist Cooney with her password issues in TAP Space.

DFO – Closing Meeting

Powers thanked the members for joining the call and declared the Toll-Free Phone Line Committee meeting closed.

Next Scheduled Meeting: Wednesday, September 14, 2016 at 2:30 p.m. EST.
1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 20, 2016**

IRS Staff

- Sheila Andrews, Director – TAP
- Debra Awalt, Program Analyst – W&I
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I (Absent)
- Tamara Birts, Senior Program Analyst – (Absent)
- Gary Johnson, Accounts Management
- Rivera, Linda, Senior Program Analyst – TAP
- Charles Swayzer, Accounts Management
- Tamikio Bohler, Senior Analyst – W&I (Absent)

TAP Members

- Timothy Bolin, Cheyenne, WY
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY (Absent)
- Ashley Hunter, Austin, TX
- David Jones, Hickory Creek, TX
- Sean McPhilamy, Talkeetna, AK
- Joan Ogden, Salt Lake City, UT (Absent)
- Blake Parke, Sioux Falls, SD
- Daniel Persons, Brooklyn, NY
- Keith Robinette, Ozark, MO
- Juliana Weeks, Blythewood, SC

Opening

Jeans declared the meeting opened and welcomed all.

Welcome/Announcements

McPhilamy welcomed all and proceeded with the agenda.

Approval of the Minutes

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

National Office Report, NOR

Andrews informed the members that the recruitment process is moving along as planned; she expects TAP to conclude the interview process by the first week of August.



The June Report to Congress has been released; a copy is available on www.TAPSpace.org. The members were informed that the report is available on www.TAPSpace.org. Andrews also mentioned that some of the TAP members' concerns/issues were covered in the report.

Chair Report

McPhilamy asked the members to take a look at the June Report to Congress.

The Joint Committee will hold their annual meeting virtually the week of August 17-24, 2016.

Systemic Advocacy Analyst Report

Birts was absent for this meeting; therefore there was no report given.

Program Owner Report

Awalt introduced Gary Johnson and Charles Swayzer to the members as subject matter experts. They members fielded questions to both Subject Matter Experts (SMEs) on the toll free line operations with regard to scheduling appointments. Johnson and Swayzer provided a brief background of how calls are routed through the system and the local time zone operations including Puerto Rico that is on Atlantic Time Zone.

McPhilamy mentioned that he has concerns with those callers on Pacific Time Zone. He questioned how taxpayers would have knowledge of the time zone they are calling. The SMEs stated that the time zone goes by the exchange area code the calls come in from.

Awalt stated that if callers can resolve their problems via the toll free line, that is the goal rather than coming to the office.

Screening Report

There were 10 issues reviewed, 2 dropped, 4 associated 1 active 1 referral and 1 will expand on call back technology.

Activity Reports

The toll free Committee continues to have good outreach numbers. Kudos to Persons for his outreach efforts.

McPhilamy asked the members go to www.TAPSpace.org and review the Monthly Newsletter posted each month. He also mentioned that the members can suggest topics they would like to see covered each month in the newsletter.

McPhilamy had a visit with Alaska Local Taxpayer Advocate.



Rivera mentioned that TAP is working on a Virtual Outreach flyer; more information will be given to the full committee at the next monthly teleconference in August.

Subcommittee Report Out – 1

The sub-committee has submitted a referral to IRS on the Customer Call Back Technology. The sub-committee is now preparing a second referral on Public Service Announcements (PSAs).

Subcommittee Report Out – 2

The sub-committee is finalizing some edits on the Authentication Retention Technology. They are reviewing the Toll-Free Appointment Line for potential enhancements.

Round Robin

The Chair opened up the roundtable to entertain questions. There were no additional discussions at that time.

Weeks asked to clarify the teleconference meeting time for her subcommittee. She also needs a name badge mailed to her.

The members were informed that due to the Joint Committee Virtual Meeting held the week of August 16-19, 2016, the next Toll Free Committee Meeting will be moved from August 17-24, 2016.

Action Items

5. Rivera asked the members – when completing the monthly activity reports spreadsheet, do not click on the top of the report, it off sets the numbers. Just fill in the bottom portion. TAP staff will do the top and roll it out.
6. Reminder, the twenty-Fifth day of the month all activity reports are due.
7. Web-Ex is being encouraged to be implemented and utilized by all TAP committees soon for all sub-committee meetings. Members are encouraged to start using it for outreach.
8. Send an email if you cannot attend the monthly meeting to the Chair and committee analyst.
9. If members need NY additional marketing materials, please notify the staff via email.
10. A calendar invitation will be sent out to remind members that the next full committee meeting will be on August 24, 2016.
11. Rivera will send a calendar invite to all the subcommittee members.

Closing

Jeans thanked the members for joining the call and declared the meeting closed.

Next Scheduled Meeting: Wednesday, August 24, 2016 at 2:30 p.m. EST.



1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 15, 2016**

IRS Staff

- Sheila Andrews, Director – TAP (Absent)
- Debra Awalt, – Program Analyst, W&I
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I (Absent)
- Tamara Birts, Senior Program Analyst – TAS
- Cedric Jeans, Program Manager – TAP
- Rivera, Linda, Senior Program Analyst – TAP

TAP Members

- Timothy Bolin, Cheyenne, WY
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY
- Ashley Hunter, Austin, TX – (Absent)
- David Jones, Hickory Creek, TX
- Sean McPhilamy, Talkeetna, AK
- Joan Ogden, Salt Lake City, UT
- Blake Parke, Sioux Falls, SD (Absent)
- Daniel Persons, Brooklyn, NY
- Keith Robinette, Ozark, MO
- Juliana Weeks, Blythewood, SC

Opening

Jeans declared the meeting opened and welcomed all.

Welcome/Announcements

McPhilamy welcomed all and proceeded with the agenda.

Approval of the Minutes

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

National Office Report, (NOR)

Jeans provided the NOR. He informed the members that TAP has started the process for hiring new members for 2017 TAP. There were over 150 candidates scheduled for interviews. TAP is looking to fill positions for alternates as well. Jeans stated TAP members are need to assist with interviews and an email will be sent out to the members asking for their assistance. This is also an opportunity for the first year members to assist with interview as well.



Chair Report

McPhilamy expressed his appreciation to the subcommittee members for their work on the project referrals. He stated the two referrals were submitted to the Joint Committee (JC), and one was returned for some minor editing. This referral will be resubmitted at the next JC meeting.

Systemic Advocacy (SA) Analyst Report

SA TOLL FREE ISSUES

The Taxpayer Assistance Center (TAC) appointment toll-free number is not available for Canadians needing ITINs who are unable to schedule appointments for assistance with ITIN applications in New York. A phone number is provided that is not the regular toll-free phone number.

SA OTHER ISSUES

Last year Tamara Birts said she mentioned the IRS was going to start putting the Collection Statute Expiration Date (CSED) on tax account transcripts. This was supposed to be implemented in January of 2016, and the actual programming has been completed however, the CSED is still not posting. The IRS is working with the programmers but updates are done on an annual schedule so the next update will not occur until January 2017. This issue was raised through the Systemic Advocacy Management System (SAMS) a few years ago and we have been working on it with the IRS since then. Community practitioners were the first to request this service because it will reduce the time spent on the phone reaching the IRS for important information.

Birts provided the following SA Report:

Week	Issues received	External Submitter	Internal Submitter
5/22/2016 – 5/29/2016	37	25 (3 attorneys, 3 LITC's, 5 practitioners, 12 taxpayers, 2 other)	12 TAS employees
5/29/2016 – 6/5/2016	15	8 (2 practitioners, 5 taxpayers, 1 IRS employee)	7 TAS employees
6/5/2016 – 6/12/2016	17	9 (LITC 3, Practitioners 2, Taxpayers 3, Other 1)	8 TAS employees

Program Owner Report

Bohler did not have anything new to report for this meeting.

Screening Report

Jeans stated that there were 6 issues reviewed, 5 were dropped and one associated.



Activity Reports

Ogden stated that there were 82 outreach events with an audience of 11,000. The total TAP participation was 1,000 hours by the end of May. Ogden thanked the members for turning out their reports timely.

Subcommittee Report Out – 1

Jones reported that his subcommittee has just completed the proposal for referral on Public Service Announcement. The comments received on the project proposal will be shared with the committee for review. This project has a deadline for July 20, 2016.

Subcommittee Report Out – 2

Sub Committee 2 is working on the revision and modification of the Authentication Retention Technology referrals for re-submission to the JC.

Round Table

The Chair opened up the roundtable to entertain questions. There were no additional discussions at that time.

Action Items

12. Rivera asked the members to adhere to the Activity Report, due date the twenty-fifth day of each month.
13. If interested in volunteering your time for assisting with TAP applicant interviews, send Rivera an email and she will contact you with the details.
14. Tax Forums around the country will be coming up; please let Rivera know if you are interested in participating in your home state.
15. Jeans asked members to take a look at the Monthly Newsletter and familiarize themselves with the articles. This will be a great help for outreach activity; members can direct the public to visit www.improveirs.org during the outreach events.

Closing

Jeans thanked the members for joining call and declared the meeting closed.

Next Scheduled Meeting: Wednesday, July 20, 2016 at 2:30 p.m. EST.

1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 18, 2016**

IRS Staff

- Sheila Andrews, Director – TAP (Absent)
- Debra Awalt, Program Analyst – W&I (Absent)
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I (Absent)
- Tamara Birts, Senior Program Analyst – TAS
- Cedric Jeans, Program Manager – TAP
- Rivera, Linda, Senior Program Analyst – TAP

TAP Members

- Timothy Bolin, Cheyenne, WY (Absent)
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY (Absent)
- Ashley Hunter, Austin, TX
- David Jones, Hickory Creek, TX
- Sean McPhilamy, Talkeetna, AK
- Joan Ogden, Salt Lake City, UT
- Blake Parke, Sioux Falls, SD
- Daniel Persons, Brooklyn, NY (Absent)
- Keith Robinette, Ozark, MO
- Juliana Weeks, Blythewood, SC

Opening

Jeans declared the meeting opened and welcomed all.

Welcome/Announcements

McPhilamy welcomed all and proceeded with the Agenda.

Approval of the minutes

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

National Office Report

Jeans reported for Andrews who is on vacation. He informed the members that The National Taxpayer Advocate (NTA) will hold a teleconference on May 26, 2016, at 2 p.m. EST. Some of the discussion will cover the Most Serious Problems with taxpayers, Annual Report to Congress and the Future State of the IRS. Members were sent a calendar invitation and are asked to participate in this teleconference.



Jeans mentioned the following tax forums and asked members who live in those areas to send an email to the TAP Staff if they are interested in attending.

City	Hotel	Dates
Chicago, IL	Hyatt Regency Chicago 151 E Upper Wacker Drive Chicago, IL 60601	July 12-14
New Orleans, LA	Hyatt New Orleans 601 Loyola Avenue New Orleans, LA 70113	July 26-28
National Harbor, MD (Washington DC Area)	Gaylord National Hotel and Convention Center 201 Waterfront Street National Harbor, MD 20745	August 23-25
Orlando, FL	Hyatt Regency Orlando 9801 International Drive Orlando, FL 32819	August 30 - September 1
San Diego, CA	Town & Country Resort and Convention Center 500 Hotel Circle North San Diego, CA 92108	September 13-15

Chair Report

McPhilamy discussed the TAP Chairs meeting he attended. He mentioned that the TAP Annual Report has been mailed out to members. If members have not received a copy. McPhilamy asked that they contact the TAP Staff. Business cards and badges were mailed out as well.

Systemic Advocacy Analyst Report

Birts provided the following SA Report:

Week	Issues received	External Submitter	Internal Submitter
4/24/2016 – 5/1/2016	37	17 (3 practitioners, 8 LITC, 6 taxpayers)	20 (All TAS employees)
5/1/2016 – 5/8/2016	20	6 (1 unknown, 1 practitioners, 2 taxpayers, 2 LITCs)	14 (1 SBSE, 13 TAS employees)
5/8/2016 –	24	9 (2 practitioners,	15(1 SBSE, 6 TAS

5/15/2016

1LITC, 6 taxpayers)

employees)

Toll-Free Issues

There were two issues related to toll free- phone agents hanging up on practitioners and IRS employees not leaving voicemails. The submitter of that issue regarding hang ups stated that it was the third time it has happened and has become more frequent. This issue is unfortunately difficult to trouble shoot. The phone assistants are monitored often by both their managers. Quality assurance and training is ongoing to improve this process.

Regarding employees not leaving voicemails, the issue was a practitioner received voicemails from the IRS however, there was no callback number or other information that would allow for a callback which delayed the practitioner's ability to solve his client's problem. This item is essentially impossible to troubleshoot without additional information.

When taxpayers or tax practitioners call the IRS, phone assistants are required to provide their names and employee ID numbers upfront. The IRS staff can use that information to advocate for better service.

The NTA is continuing to hold Public Hearings across the country about the future state of the IRS. Members can view the information about the speakers and topics at www.irs.gov/advocate and also by searching under Trending in TAS. The last public forum was held in Washington, D.C., on May 17, 2016; the notes from that session have not been loaded to the page but will be available within the next few days.

A member raised the question, - what if the person has an alias? If we get their names how would the IRS Staff be able to track those persons? Birts replied if they have an alias there has to be a real name associated with it in the system and employees are required to provide their name (or alias) and their employee ID number so this should be adequate information for the IRS staff to work with.

Program Owner Report

Awalt was absent for this meeting.

Screening Report

The screening committee reviewed 7 issues. Six were dropped, 1 was closed and 1 was associated.

Activity Reports

Rivera reminded the members that they should use the current version of the Excel spreadsheet template sent via email. As a reminder, the activity is due on the twenty-fifth day of each month.



McPhilamy also reiterated that it is imperative that members have the current spreadsheet to submit their reports timely.

Subcommittee Report Out – 1

This committee has finalized their referral on the Customer Callback Technology. The referral is currently being submitted for approval during the May Joint Committee (JC) meeting. This referral has seven recommendations. The committee has started to work on Public Service Announcements (PSAs).

Subcommittee Report Out – 2

This committee has finalized its referral on the Authentication Retention Technology. This referral has two recommendations. This committee has tentatively looked at the possibility of reviewing the Toll-Free appointment line for making improvements and enhancements

Round Table

Cooney shared her experience at the National Taxpayer Advocacy forum in Iowa attended by Tax Practitioners and Taxpayers. There was a panel discussion with Iowa Senator Grassley. Cooney encourages the members to attend those public forums if they are hosted in their cities.

Rivera thanked the subcommittee members for their work on the 2 referrals that are going forward to the JC for approval.

McPhilamy mentioned sitting on a plane next to a passenger is a great opportunity to conduct an outreach and, record that time spent on the member activity report.

McPhilamy and Rivera thanked Persons, Cooney, Ogden and Robinette for their contributions to the subcommittee referrals and outreach activities. McPhilamy mentioned the TAP Monthly News Letter (MNL), he asked for volunteers to take the lead on a Subcommittee for contribute to the MNL due on the first Friday of each month.

Action Items

Activity Report, due on the twenty-fifth day of each month.

Closing

Jeans thanked the members for joining call and declared the meeting closed.

Next Scheduled Meeting: Wednesday, June 15, 2016 at 2:30 p.m. EST. 1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 20, 2016**

IRS Staff

- Sheila Andrews, Director – TAP
- Linda Rivera, Program Analyst – TAP
- Rose A. Babb, Management Assistant – TAP
- Johnnie Beale, Tax Analyst – W&I
- Tamara Birts, Senior Program Analyst – TAS
- Cedric Jeans, Program Manager – TAP
- Rivera, Linda, Senior Program Analyst – TAP

TAP Members

- Timothy Bolin, Cheyenne, WY (Absent)
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY (Absent)
- Ashley Hunter, Austin, TX (Absent)
- David Jones, Hickory Creek, TX
- Sean McPhilamy, Talkeetna, AK
- Joan Ogden, Salt Lake City, UT (Absent)
- Blake Parke, Sioux Falls, SD (Absent)
- Daniel Persons, Brooklyn, NY
- Keith Robinette, Ozark, MO

Opening

Jeans declared the meeting opened and welcomed all.

Welcome/Announcements

Rivera proceeded with the administration of the Agenda until the Chair McPhilamy joined the teleconference call.

National Office Report

Andrews welcomed the members and mentioned the email “Future State” calendar invite sent out today to all TAP members for May 10, 2016. The email also provided a PowerPoint presentation that will be given by Mark Gillen. A question and answer session will be entertained subsequent to the presentation. Members are encouraged to attend.

The TAP member virtual meeting will be held April 28, 2016; members are encouraged to attend. Each committee will do a report out on where they stand with working issues and other assignments.



TAP East Chief Comments

Jeans reported that the recruitment period has just kicked off; the open period began April 11, 2016 through May 15, 2016. Members are encouraged to put the word out for the states TAP will be recruiting from. The list of states can be found on USA JOBS. A link is also provided via improveirs.org to send the public to USA Jobs website as well.

Chair Report

McPhilamy stated that he attended a joint meeting with the chair and vice chairs to discuss concerns in TAP membership. He also stated that activity reports are very important; it is how TAP connects with taxpayers.

Systemic Advocacy Analyst Report

Birts provided the following SA Report:

Week	Issues received	External Submitter	Internal Submitter
3/27/16 – 4/2/2016	24	16 (3 practitioners, 1 LITC, 12 taxpayers)	8 (All TAS employees)
4/3/2016 – 4/9/2016	29	13 (2 attys, 4 practitioners, 6 taxpayers, 1 other)	16 (All TAS employees)
4/10/2016 – 4/17/2016	37	16 (2 attys, 1 other, 13 taxpayers)	21 (1 W&I, 1 TEGE, 19 TAS employees)

TOLL FREE ISSUES

There were no issues related to Toll-Free in this group of issues.

Per IRS Commissioner Koskinen, despite continued budget challenges the IRS call site employees answered more than 11 million calls from taxpayers this year. The level of service on the toll-free help lines this filing season frequently topped 70 percent, a remarkable improvement over last year's 38 percent.

Transcripts

The Get Transcripts application has been down since the middle of last year. The IRS recently asked the management and executive level staff members to test the current version. A date for when it will be available to the public is currently not available.

The National Taxpayer Advocate is continuing to hold Public Hearings across the country about the future state of the IRS. You can view the transcripts from Harrisburg Pennsylvania by going to www.irs.gov/advocate and searching under Trending in TAS.



Roll Call

Roll call was taken by Babb. The administrative minutes for March were approved by the members.

Program Owner Report

Awalt did not have anything new to report however, she stated that the IRS is able to service more taxpayers during this filing season due to funding from congress.

Beale mentioned that this funding is a special provision for 2016 and that he hopes it is available for 2017 as well.

Screening Report

Robinette gave a report on the status of the parking lot issues some issues were dropped, some were sent to the appropriate committee and, some phone calls were made to submitters as follow ups.

Activity Reports

Rivera reminded the members that they should use the current version of the Excel spreadsheet template sent via email. As a reminder, the activity is due on the 25 day of each month.

McPhilamy also reiterated that it is imperative that members have the current spreadsheet to submit their reports timely.

Subcommittee Report Out – 1

They are working on the Call Back system. The Team will review the referral for any needed additions/changes.

Subcommittee Report Out – 2

They are working on the Authentication Retention Technology. The Team will review the referral for any needed additions/changes.

Action Items

- Jeans is working on introducing Web Ex on the next full committee call. He explained that this software will enable TAP members to view the documents/assignments being discussed during the call
- Rivera will send out the new spreadsheet version for activity reports subsequent to this teleconference.
- Business cards and badges will be sent out to members next week.

Closing



Jeans thanked the members for the work they do for TAP; he reminded them that their work is important and is making a difference in the lives of taxpayers.

Next Scheduled Meeting: Wednesday, May 18, 2016 at 2:30 p.m. EST.
1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 23, 2016**

IRS Staff

- Sheila Andrews, Director – TAP
- Linda Rivera, Senior TAP Analyst
- Rose A. Babb, Management Assistant – TAP
- Cedric Jeans, Program Manager – TAP(Absent)
- Rivera, Linda, Senior Program Analyst

TAP Members

- Timothy Bolin, Cheyenne, WY
- Gretchen Cooney, Holstein, IA
- Felicia Horton, Lexington, KY
- Ashley Hunter, Austin, TX
- David Jones, Hickory Creek, TX
- Sean McPhilamy, Talkeetna, AK (Absent)
- Joan Ogden, Salt Lake City, UT (Absent)
- Blake Parke, Sioux Falls, SD
- Daniel Persons, Brooklyn, NY
- Keith Robinette, Ozark, MO (Absent)
- Jacqueline Scott-Bailey, Columbia, SC (Absent)

Opening

Rivera officially opened the administrative meeting and welcomed the members. This meeting was pursuant to the face to face meeting in February. Because this meeting was administrative, and not published in the Federal Register, the public was not invited.

Welcome/Announcements

Rivera proceeded with the administration of the agenda, since the chair and vice-chair had excused absences.

Andrews welcomed the members and mentioned that there will be quarterly meetings for the members. These meetings are to bring members in line with how the IRS works and, also provide information on what other committees are working on. Andrews will be sending out calendar invites to the entire membership for the meetings.

Roll Call

Roll call was taken by Babb.



Miscellaneous Items

Rivera followed up and reviewed the following with the new and returning members:

- Business cards and Name badges and;
- TAP Handbook. TAP Handbook will be mailed to Ashley Hunter who has not received her copy.

TAP Space Access

Rivera canvassed all the new members to make sure they all had access to the TAP Space website. One member, still needs access most have already begun exploring the site and familiarizing themselves.

Travel Voucher Funds Reimbursement

The members were informed that the travel reimbursement process is moving along, some members were paid and the other members will receive their deposits within the next week. If anyone has any concerns, they should contact Rose Babb.

New Member Press Releases

Rivera encouraged the new members to use the press release template in the Outreach toolkit on the Tap Space website to distribute notification regarding their appointment to the Panel. Cooney encouraged the members to add their college alumni and professional associations to the distribution.

Local Taxpayer Contacts, (LTA)s

Rivera asked the members if they have started reaching out to their Local Taxpayer Advocates (LTA)s. Rivera stated that she will reach out on behalf of the members to their LTAs to make sure they are contacted.

Monthly Meetings

Rivera reviewed the yearly calendar of events for the Toll Free Committee and other general meetings in TAP, to ensure that the member's information was correct. There was a brief discussion on the following:

- Annual meeting dates/times
- Full committee
- Subcommittee – One
- Subcommittee – Two
- Chair/Analyst Meeting
- Screening Call
- Outreach Committee
- Joint Committee



- Internal Communications- Rivera will update on Master Annual calendar when dates/times are decided.
- Ad Hoc Meetings

Joint Committee (JC) Meetings

Rivera emphasized that although the meeting is for Chairs, Vice Chairs and subcommittee members may be invited. This invitation would be to provide additional information to referrals reviewed by the JC.

Mentorship Program Review

Rivera asked members to continue working with their mentors. If the new members have any issues, contacting or working with their mentors, please contact Rivera. Ogden will be out of the country for a month; Cooney volunteered to assist mentoring Hunter during that time.

Activity Reports

Rivera reminded the members that reports are due this week on the twenty-fifth of each month. A copy of the most current version of the activity report template was provided to the members via email.

Toll Free Referrals

Rivera advised that the team has two referrals that she is reviewing. One will be submitted to the QR team, with a response date requested of Monday, if possible. Then both will be submitted to Cedric and Attorney Advisors for review. The intended outcome is to have both placed on the Toll Free Agenda for April 20, 2016 and approved by the full committee. We will then move it forward to the JC, hopefully for the month of April. Rivera and Jeans will work with the JC analyst to advise that the referral is not getting approved until the week before JC. Cooney will advise the JC of the tight timeframe.

Full Committee Meeting

Rivera discussed the importance of attendance at the Toll Free full committee meetings scheduled for specifically April 20, 2016. She reminded all members of the importance of approving the referrals, so they can move forward to the JC. Quorum is essential at this meeting.

Closing

With no additional questions or comments, Rivera adjourned the meeting.

Action Items

Rivera will follow-up on the following items:

1. Badges for the Members
2. Business Cards for the Members
3. Outreach Materials for the Members
4. Travel Voucher fund reimbursements



Next Scheduled Meeting: Wednesday, April 20, 2016 at 2:30 p.m. EST.
1-888-331-8226 Access Code 8017262

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
February 29 – March 1, 2016**

Designated Federal Officer:

- Jeans, Cedric Memphis, Tennessee Designated Federal Officer

Attendance:

- Bolin, Timothy Cheyenne, WY Member
- Cooney, Gretchen Holstein, IA Member
- Horton, Felicia Lexington, KY Member
- Jones, David E. Hickory Creek, TX Member
- Ogden, Joan Salt Lake City, UT Member
- Parke, Blake R. Sioux Falls, SD Member
- Persons, Daniel Brooklyn, NY Member
- McPhilamy, Sean Talkeetna, AK Member Present by Phone
- Robinette, Keith L. Ozark, MO Member Present by Phone

Members Absent:

- Hunter, Ashley M. Austin, Texas Member
- Scott-Bailey, Jacqueline Columbia, SC Member

Staff

- Cedric Jeans, Designated Federal Official (DFO)
- Linda Rivera, TAP Senior Analyst
- Otis Simpson, TAP Analyst
- Tamikio Bohler, W&I Program Liaison
- Tamara Birts, TAS Systemic Advocacy Senior Analyst

Member(s) of the Public:

None

Opening:

Cedric Jeans officially opened the meeting as the DFO and welcomed everyone to the meeting.

Welcome/Announcements:

Jeans then proceeded to discuss Administrative announcements and reviewed the Agenda.

Roll Call :



Roll call followed by self-introductions of the staff and the TAP members. Rivera asked the committee members and staff to do introductions and provide their work expertise and occupation.

TAP Mission:

Jeans discussed the TAP Mission with the Toll Free committee members. He also briefing informed the members to review the Ethics and volunteer agreement. The agreements were signed by all new members and secured for retention. Jeans also went over the recent charter renewals and shared the process of renewing the charter every two years.

Icebreaker:

Rivera shared an Icebreaker with the Toll Free committee for members to write three things no one knows about them.

Mentoring Program:

Rivera gave a quick overview of the guidelines for the Mentoring Program. She then verified with the new Toll Free members whether they had been in connection with their assigned mentor. Rivera went on to advise the members to respect and take into consideration, each other's daily schedules, and time zones. She also asked them to reach out to her if the mentor process is broken and/or mentors need to be assigned or reassigned.

Chair and Vice Chair Roles and Responsibilities:

The TAP Staff explained the role and responsibilities of a committee Chair and Vice-Chair prior to elections. A PowerPoint was provided to the members.

Chair and Vice Chair Nominations:

Nominations were held for the Toll Free committee Chair and Vice Chair. Sean McPhilamy was the sole nomination for Chair. Joan Ogden and Keith Robinette were nominated for Vice-Chair. Rivera confirmed acceptance of the nomination and each nominee was given a chance for a quick one minute presentation.

Toll Free Election Results:

All members present voted included a call in members who emailed their vote. TAP Staff counted and validated the ballots.

Rivera announced the newly elected Toll Free Chair and Vice Chair, as follows:

Toll Free Chair Elected:

Sean McPhilamy

Toll Free Vice-Chair Elected:

Joan Ogden



Approval of the Minutes (November – 2015)

The Vice-Chair acted on behalf of Chair and requested approval of the minutes. The committee agreed with minutes as written. The Minutes were approved.

Ground Rules & Phone Etiquette

Rivera reviewed the phone etiquette and ground rules for meetings. Simpson advised the committee should remain respectful of staff, SME's (Subject Matter Experts), and IRS staff during meetings.

- Rivera explained the methods of communication and said members must always communicate through her and the DFO, Cedric Jeans. The preferred method of communication is email.
- Ground rules were established for committee meetings, along with telephone etiquette. Rivera informed members to mute their phones when on committee calls after roll calls, and when they are not speaking.
- Members were informed that there will be times when everyone doesn't agree but to remain respectful. TAP business decisions rely mainly on consensus, even if you don't agree.
- Rivera explained the importance of establishing meeting quorum. We will need 50% membership plus one to meet quorum.
- Committee minutes will be recorded into the FACA database as an official record.

Activity Reports:

Rivera discussed how to report time utilization for TAP Activities. Toll Free members must log all their time, which includes reading emails, outreach, committee meetings, etc. Rivera explained the activities reports are used to calculate the number of hours needed to receive the Presidential Volunteer Award.

The Toll Free members were advised and reminded that reports are due on the twenty-fifth day of each month. Jeans demonstrated how to use the Activity Report. Members will be mailed an updated Activity Report.

Screening an issue:

Rivera covered the "Screening an Issue" process and the workflow path of issues coming into TAP. Jeans did an overview and explained that every issue is initially screened by the staff to ensure it meets TAP criteria prior to sending to the full committee. The staff explained the role of the screening committee, who is designated to determine whether the issue falls within current scope of committee work and whether it meets the criteria of a project. The staff explained some issues may align with the National Taxpayer Advocates (NTA)'s Annual Report to Congress (ARC) Most Serious Problems (MSPs). Rivera talked about the Systemic Advocacy Management System (SAMS), which is a database used to house TAP issues and projects.



A formal current screening report was furnished at F2F (Face to Face) to the Toll Free committee. A live example was shared with the committee as an exercise.

Establishment of the Toll Free Committee Meeting dates and time:

The establishment of the committee meeting dates and times were discussed with all members present. The committee agreed to the following meeting dates and time for the year:

Toll Free Full Committee Meetings:

When: Third Wednesday of each month

Time: 2:30-3:30 p.m. (EST)

Audience: All Toll Free Members

Toll Free Sub-One Committee Meetings:

When: Third Wednesday of each month

Time: Noon-1p.m. (EST)

Team Members: Gretchen Cooney, Keith L. Robinette, Timothy Bolin, David E. Jones, Felicia Horton, Jacqueline Scott-Bailey.

Toll Free Sub-Two Committee Meetings:

When: Third Wednesday of each month

Time: 1-2 p.m. (EST)

Team Members: Sean McPhilamy, Joan Ogden, Ashley M. Hunter, Daniel Persons, Blake R. Parke

Screening Call Meetings:

When: Third Monday of each month

Time: 11 a.m.-Noon (EST)

Team Members: Keith L. Robinette, David E. Jones, Blake R. Parke, Timothy Bolin

Outreach Communications Committee:

When: Third Monday of each month

Time: 1:30-2:30 p.m. (EST)

Team Members: Joan Ogden, Daniel Persons

Internal Communications:

(Meeting dates will be established by the Taxpayer Communications Committee)

Team Members: Gretchen Cooney, Joan Ogden

Quality Review-Ad Hoc Committee:

Ad Hoc Meeting

Team Members: Gretchen Cooney, David E. Jones



- ✓ Rivera discussed the role of the Quality Review (QR) committee. She states they do not change content. They look for grammar and presentation. After QR it goes to the Attorney Advisers.

Travel Procedures

Simpson briefly discussed the procedures that members needed to follow in order to secure pre-approval of potential outreach expenses prior to conducting outreach that will incur a cost. Simpson explained when members are required to provide receipts for expenses, along with what is eligible for reimbursement.

W&I Program Owner Update

Debbie Awalt and Jeff Cleveland of W&I provided an updated on IRS hiring initiatives to address concerns with IRS staffing. Jeff Cleveland is the Chief of the Planning and Analysis section of the IRS that covers telephone lines. Cleveland stated the hiring process takes approximately three months and they plan to have around 3100 assistors in FY 2016. Joan asks will the new hires be permanent or part time. Cleveland informed the committee they plan to hire some full time and some seasonal hires. Cleveland stated he believe the seasonal hires will be on board approximately 6 months versus the previously average of four months. Appropriations stated funds were stipulated for higher Level of Service (LOS). The IRS has a budget for 600 Full-Time Equivalency (FTE) (2088 hours per FTE) of overtime.

Cleveland provided statistical data for taxpayers trying to reach the IRS and their wait times. The Data was provided via a PowerPoint presentation and the members received a copy.

Awalt explained the IRS was open Presidents Day and opened on the holiday in January to help accommodate the opening tax season. She also stated they will be open the Saturday before the tax filing due date of April 18, 2016.

2016 Project Committee Focus and Reviews:

Linda Rivera and Joan Ogden explained the Toll Free lines focus.

Jeans showed the members the volume of Toll Free lines scripts owned by IRS. The 800-829-1040 phone script was reviewed, and the members saw the extensive script for this particular line.

Ogden spoke about and defined the purpose of the Flesh Kincaid test. She explained the use of this tool could be used to review some of the many telephone scripts in order to improve them. The Vice Chair also shared her vision around an opportunity to improve the Affordable Care Act (ACA) toll free script. Rivera mentioned there are two subcommittees and we can split the work between the two, if consensus is reached to work as a project.



Rivera mentioned the new TAC Appointment Scheduling process and the importance of ensuring the Toll Free line scripts are correct. Rivera also discussed that the IRS may seek the project committee's help with new projects or focus throughout the year along with the committee forthcoming grassroots initiatives.

Rivera suggested the committee to consider a project for the ability to share documents between IRS and taxpayers before appointments. The goal is to enhance appointment process, and mitigate issues involving receipt of correspondence.

Bohler stated the IRS has updated the IRS.gov website to identify all TAC Offices that are by appointment only.

Toll Free Sub-One Committee:

Customer Callback Technology was last year's prior project. Robinette asked that certain prompts be changed on the referral completed by the previous sub-committee.

The newly formed sub-committee reviewed the referral and made a few minor suggestions/corrections. The referral was then reviewed for quality. This committee will send Linda Rivera a copy of the final referral so the product can be approved by the full committee, then forwarded to the Attorney Advisor prior to placing on the JC Agenda for April 2016.

Toll Free Sub-Two Committee:

Toll Free Authentication Retention Technology was another one of last year's projects. Ogden and the team reviewed the draft of the referral. The committee decided the referral needed additional expansion of recommendations. The committee will continue to work on the referral during their first subcommittee call to perfect the referral and move it forward for full committee approval.

Project Focus Group

The Future State of IRS was presented by Jeans. Jeans explained that a number of changes are slowly underway at the IRS and more are under consideration. Members were informed that the IRS plans to take advantage of the latest technology to move the entire taxpayer experience to a new level while respecting taxpayer rights. Jeans shared a mock vignette of the future state for individual, small business/self-employed, and Large Business processes. The Future state vignettes can be found on www.irs.gov.

Vignette Review:

The three vignettes were discussed by the committee as a whole.



Committee members discussed and used the following questions to help brainstorm the proposed process:

- What was your initial reaction?
- Does the vignette accurately describe the flow of the taxpayer interaction being described?
- Give feedback on how should the vignette be changes when issues are complex and not resolved through self-help methods.
- How do the vignettes address taxpayers that do not fit into the “Future State” vignettes?
- Does anything give you concern with the vignettes?
- Do you have suggestions for the vignettes?

The committee suggestions and comments for all three vignettes were captured and will be consolidated by staff and elevated to the NTA. The staff will also load the consolidated response on TAP Space for members.

Systemic Advocacy Program Update:

Tamara Birts provided an update to various initiatives and issues recently received in Systemic Advocacy. Birts explained how TAP and SA share the same goals and she will share updates periodically at committee meetings.

Meeting Assessment/Next Steps:

Rivera validated committee meeting dates and time. She also verified if members contact information was correct. Simpson also explained that business cards and badges will be sent out when he returns to the office next week.

All recurring meetings (full and subcommittee) have been established and an outlook meeting invitation will be sent.

Members are currently working on pending items. Committee documents will be added to TAP Space and members were encouraged to use the site to interact with each other. It was explained when sending emails be sure to send to all subcommittee members, with a carbon copy (cc) to Rivera, and Jeans.

Question, Comments, Concerns:

Jeans and Rivera thanked everyone. Jeans advised that a survey about the F2F experience will be sent out shortly. Rivera reiterated the importance of completing the survey and how the results will allow the Staff and membership to enrich next year’s annual meeting.



Adjournment and Official Closing:

The meeting was officially adjourned by the DFO.

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