



2015 Meeting Minutes Toll-Free Phone Line Project Committee

- November 18, 2015
- October 21, 2015
- September 16, 2015
- August 19, 2015
- July 15, 2015
- June 17, 2015
- May 20, 2015
- April 15, 2015
- March 18, 2015
- February 18, 2015
- January 12-13, 2015

Toll-Free Phone Line Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes November 18, 2015

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Analyst, W&I
- Johnnie Beale – Senior Program Analyst, W&I (Absent)
- Tamara Birts – Senior Program Analyst, TAS (Absent)
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Program Manager, DFO
- Cindy Jones – Supervisory Program Analyst (Absent)
- Betty Scott – Program Assistant, W&I,

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Gilberte Mayo – Lincoln, ME (Absent)
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA (Absent)
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)
- Jacqueline Scott-Bailey – Columbia, SC (Absent)



- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Jeans welcomed everyone and declared the meeting opened. This was the last meeting for the year.

Roll Call

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

DFO Report

Jeans mentioned the email link that was sent to all TAP members to complete a survey; this survey enables TAP to add value to the current process in place for TAP members

Chair Report

Cooney welcomed everyone to the teleconference and proceeded with the agenda. She mentioned to the members that they should contact the TAP staff if they need business cards, marketing materials and name badges. Cooney also asked members to reach out to their committee leads if they have any questions and concerns on how to proceed with referrals.

Systemic Advocate Update

Birts was absent for this meeting however, Rivera presented the following report on her behalf:

Week	Issues received	External Submitter	Internal Submitter
10/18/2015 – 10/25/2015	28	9	19 (All TAS employees)
10/25/2015 – 11/12015	11	4	7 (All TAS employees)
11/1/2015 – 11/8/2015	26	9	17 (All TAS employees)

ACCESS AND SERVICE ISSUES

Transcripts

The updated Transcript Delivery System (TDS) went live on November 2, 2015. The improvements promise fewer steps for the user. Users are experiencing problems with printing. I reached out to E-Services and was advised transcripts won't print if a web browser other than Internet Explorer is used and the IRS cannot support any other browsers so this issue will not change. E-Services have posted information on the login page and plan to post a message to www.irs.gov.



Practitioner Priority Service (PPS)

- a) Excessive hold times followed by “courtesy” disconnects are frustrating the practitioners. The practitioners would like the option of remaining on hold but this is not currently an option, or some sort of system that will allow the IRS to call them back.
- b) Inconsistent customer service. Specifically, even though IRM 21.3.10.2.1(2) states PPS can help each practitioner with up to 5 clients per call, sometimes the practitioners are limited to one client per call. This is especially frustrating when the wait times are factored in.
- c) Being transferred to another application where they must wait an extended period of time again and are then only allowed to address 1 client issue during that call. Centralized Authorization File (CAF) Unit issues

Centralized Authorization File (CAF) Unit issues

- a) Forms 2848 are not being processed within the promised timeframes. IRM 21.3.7.1.4 (09-11-2015) currently stated the CAF utilizes first in first out method and all receipts will be processed within 5 business days. If an item comes in after 3 pm, it is considered as being received the next day.
- b) If there are problems with the form or practitioners want to check the status there is no one to call.

Program Owner Report

Bohler expressed her appreciation to all the members for their work on the TAC Committee this year. She mentioned that there are assignments in the pipeline for 2016; at this time, these assignments have not been approved but Bohler expects to have them ready for the new TAP year.

Activity Report-Outreach

Halleman stated that for the month of October, there were five members that submitted reports; he stressed that even if the reports are late, they should be submitted in order for members to receive credit for outreach activity. There were 50 outreaches with an audience of 37 where two issues were submitted.

Mentoring

Halleman informed the members that it is an invaluable experience to become mentors to new members. He mentioned to members that if they chose to become mentors, they should keep in touch with their mentees regularly.



Subcommittee Report – 1

Cooney reported that her subcommittee will be working on a proposed draft for the members to discuss at the face to face meeting.

Subcommittee Report – 2

McPhilamy reported that his subcommittee is working on two different referrals: (1) Customer Authentication and (2) Customer call back option capability.

Public Participation

There were no members from the public on the call.

Action Items

1. Jeans asked members if they have any items they wish to submit for inclusion in the Annual Report to Congress, they should do so very soon via email to him and the analysts.
2. Rivera stated that an email from TAP was sent to all members to solicit instructors to teach and review material content for the face to face meeting in January 2016. Members are asked if interested in volunteering, please respond to Rivera or Simpson.
3. Respond to Rivera/Simpson as well with committee choice if interested in switching committees; first or second choice will be accommodated.

Closing Comments

Cooney thanked all the members on the committee for their dedication all year. She thanked those rotating off for their services as well.

Rivera thanked the members and staff for their hard work.

Jeans thanked the members for their hard work over the last three years.

Closing:

Cooney and Jeans closed the meeting; this is the last meeting for 2015. The TAP Face to Face Meeting is scheduled for the week of January 11, 2016 the dates and times for the 2016 teleconference meetings will be announced at the face to face meeting.

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 21, 2015**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Analyst, W&I
- Johnnie Beale – Senior Program Analyst, W&I
- Tamara Birts – Senior Program Analyst, TAS
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Program Manager, DFO
- Cindy Jones – Supervisory Program Analyst
- Betty Scott – Program Assistant, W&I, (Absent)

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO, (Absent)
- Lonnie Mayer – Tripp, SD (Absent)
- Gilberte Mayo – Lincoln, ME
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA (Absent)
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)
- Jacqueline Scott-Bailey – Columbia, SC (Absent)
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Jeans welcomed everyone to the meeting and declared the meeting opened.

Roll Call

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

DFO Report

Jeans thanked the TAC members for their hard work; he informed the members that there will be a meeting to talk about Chair and Vice Chair positions that will become available as the end of the TAP year approaches. Returning members will receive solicitation via email regarding their choices of which committee they would like to join. If members chose to stay with the same committee they are serving on currently that is fine. Otherwise, members will be given a first second and third choice of a committee they may wish to serve on. TAP Staff tries to accommodate those choices.



Jeans suggested that if a member wants to elect someone to run for Chair or Vice Chair positions in the TAP membership, they should have a conversation with the member before recommending the person for the position.

Chair Report

Cooney welcomed everyone to the teleconference and proceeded with the agenda.

Systemic Advocate Update

Birts presented the following report:

Systemic Advocacy (SA) is averaging 23 submissions per week and the submissions are all over the place. Systemic Advocacy have complaints about CSEDs expired but collection continues, complaints about IVO, hold times, lack of access, etc.

Week	Issues received	External Submitter	Internal Submitter
9/6/2015 – 9/13/2015	19	7	12 (All TAS employees)
9/13/2015 – 9/19/2015	21	11	10 (All TAS employees)
9/27/2015 – 10/3/2015	27	10	17 (All TAS employees)
10/4/2015 – 10/10/2015	---	---	No report received
10/11/2015 – 10/18/2015	27	12	15 (All TAS employees)

Issues that may be of interest to the TAP;

Access and Service issues:

SA continues to receive complaints about the excessive hold times and general difficulties obtaining assistance from the IRS via the telephone and Taxpayer Assistance Centers (walk-in offices). The IRS continues to look into ways to alleviate some of these problems including providing appointment services at some of its walk-in offices. The phone access is a matter of available staffing and funding so while the IRS is looking into ways to alleviate some of the problems, are no clear solutions have been provided at this time and TAS continues to advocate for solutions when feasible.

Transcripts:

Get Transcripts – with the system being down indefinitely, IRS Field Assistance is seeing a heavy volume of request for transcripts and is looking at identifying specific third party requestors for transcripts to determine how to develop targeted messages on how those entities can obtain transcripts without going to a TAC. This is generally



mortgage companies and banks; however with Get Transcripts now offline, the walk-in site, and TAS are seeing an increase in taxpayers request for help. There is also an executive level team working this issue.

Program Owner Report

Bohler was absent for this meeting.

Screening

Rivera postponed the teleconference meeting due to a few members were in travel status.

Activity Report – Outreach

For the month of September, there were 10 hours of outreach events reported by TAP members with an audience of 290. Rivera reminded the members to attend and participate in the monthly meetings and outreach activities.

Cooney made contact with her local Taxpayer Advocate in Des Moines, IA while participating in a marathon.

Mentoring

Cooney mentioned that her mentee Ogden is doing very well.

Subcommittee Report – 1

Rivera reported that most of the members are out of town; however, they are in they are in the process of drafting their first referral for the practitioner line. They will be working the referral into next year.

Subcommittee Report – 2

McPhilamy reported that his subcommittee is working their first referral of two issues. McPhilamy mentioned the second referral which discusses providing taxpayers with call back in a certain time frame.

Beale mentioned that McPhilamy' issue is on point with what has been discussed in the National Taxpayer Advocate's 2016 IRS Budget to Congress addresses.

Public Participation

None

Action Items

1. Jeans asked members to identify 5 or 6 locations for good outreach events in their home state and, come prepared to share this information at the next face to face meeting.



2. Awalt asked that when members are out conducting outreach events, they should inform their audiences that the IRS does not contact taxpayers via phone to discuss tax issues or demand payment for their accounts on the phone.
3. Rivera stated that a staff email to the Toll Free members soliciting for instructors to teach the classes at the face to face meeting in January 2016 will be sent out in November.

Rivera asked the members to consider mentorship for the new panel members that will be coming on board in for 2016.

Closing:

Cooney and Jeans closed the meeting.

The next and final Toll Free Phone Line Committee Teleconference for the year will be held on Wednesday, November 18, 2015 at, 2:30 p.m. ET; 1:30 p.m. CT; 12:30 p.m. MT; 11:30 a.m. PT.

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 16, 2015**

IRS Staff

- Sheila Andrews – TAP Director (Absent)
- Debra Awalt – Program Analyst, W&I
- Johnnie Beale – Senior Program Analyst, W&I
- Tamara Birts – Senior Program Analyst, TAS (Absent)
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Program Manager, DFO (Absent)
- Cindy Jones – Supervisory Program Analyst (Absent)
- Donna Powers – Program Analyst, TAP
- Linda Rivera – Senior Program Analyst, TAP
- Betty Scott – Program Assistant, W&I

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD (Absent)
- Gilberte Mayo – Lincoln, ME (Absent)
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA (Absent)
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)
- Jacqueline Scott-Bailey – Columbia, SC (Absent)
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Powers was the DFO for this meeting; she welcomed everyone and declared the meeting opened.

Roll Call

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

DFO Report

Powers stated that TAP is approaching its year end and, all outstanding referrals will need to be finalized in order to get on the September/October Joint Committee (JC) agenda. The selection process for new panel members has gone forward to the National Taxpayer Advocate the next step is the approval from the Department of Treasury which has the final approval.

A due date of September 18, 2015, was issued back in August for possible 2016 project proposals; TAP is expected to keep that deadline. If there are any issues or questions, the members are asked to contact their chair and TAP analyst.

Chair Report

Cooney welcomed everyone to the teleconference and proceeded with the agenda.

Systemic Advocate Update

There was no Systemic Advocacy (SA) update.

Program Owner Report

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

Screening

There were three issues submitted to screening this month. This year there is less submission of issues so far. McPhilamy has reached out to a submitter but found that the issue was already resolved. McPhilamy discussed TAP with the submitter.

Activity Report-Outreach

For the month of August, there were nine outreach events reported by TAP members with an audience of 7,889 – 1 issue was received.

Mentoring

Halleman reported that he has not spoken to his mentee Meade recently. Robinette was absent from the meeting.

Cooney reported that she is pleased with Ogden's progress; she is doing well.

Subcommittee Report – 1

Halleman stated that his subcommittee met today. He received information on Priority Practitioner Service (PPS), phone tree. Halleman's subcommittee will now get started by breaking out the PPS issues into two separate parts for one referral.

Subcommittee Report – 2

McPhilamy reported that he will have a follow-up call with his subcommittee next week. His subcommittee is reviewing material received from IRS on identifying calls on customer service & wait times that are problematic along with some technology improvements that the IRS plans to implement for improvement and in customer service & wait time.

Public Participation

None

Action Item:

Rivera will follow up on the Toll Free action plan to ensure that the members are on point – knowing what assignments they are responsible for and, clarifying any questions to keep the committee on point.

Sean will provide his subcommittee with a Plan of Action and schedule a proposed additional working meeting for next Monday. The Plan of Action will outline specific project due dates and deliverables that need to be completed by the team.

Halleman will send out an email to the subcommittee on the Priority Practitioner Services issues (separate parts to the referral) he discussed. This email will discuss what is needed to get referrals finalized before year end. He will initiate a plan of action and schedule an additional working meeting for next month. The Plan of action will outline specific project due dates and deliverables that need to be completed by the team.

Closing:

The meeting was closed by Donna Powers, who was acting as DFO.

Next Scheduled Meeting:

**The next Toll Free Teleconference will be held on Wednesday, October 21, 2015
2:30 p.m. ET; 1:30 p.m. CT; 12:30 p.m. MT; 11:30 a.m. PT.**

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 19, 2015**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Analyst, W&I
- Johnnie Beale – Senior Program Analyst, W&I
- Tamara Birts – Senior Program Analyst, TAS
- Tamikio Bohler – Program Analyst, W&I (Absent)
- Cedric Jeans – Program Manager, DFO (Absent)
- Cindy Jones – Supervisory Program Analyst
- Linda Rivera – Senior Program Analyst, TAP
- Betty Scott – Program Assistant, W&I

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Gilberte Mayo – Lincoln, ME (Absent)
- Sean McPhilamy – Talkeetna, AK (Absent)
- Larry Meade – Sacramento, CA (Absent)
- Joan Ogden – Salt Lake City, UT (Absent)
- Daniel Persons – Brooklyn, NY (Absent)
- Keith Robinette – Ozark, MO
- Jacqueline Scott-Bailey – Columbia, SC
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Andrews was the DFO for this meeting, she welcomed everyone and declared the meeting opened.

Roll Call/Minute Approval

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

National Office Report

Andrews stated that the Joint Committee (JC) meeting in Jacksonville early this month was a success. She talked about the budget for next year's meeting will be worst that it is currently. The TAP Staff proposed that the Regional Meetings have a standing date year to year. It was suggested at the JC meeting that the meeting be held the week of



January 11-15, 2016. The staff is awaiting feedback from the other project committees on the new proposed standing date for the regional meetings.

Andrews mentioned the email she sent last week to all members on the Affordable Care Act Calculator. Members were asked to take look at it and respond by Thursday, August 20, 2015.

Chair Report

Cooney welcomed everyone to the teleconference and proceeded with the agenda.

Systemic Advocate Update

Birts provided the following SAMs report for the Toll Free Committee:

Week	Issues received	External Submitter	Internal Submitter
7/19/2015 – 7/26/2015	24	9	151 (All TAS employees)
7/26/2015 – 8/2/2015	21	14	6 (All TAS employees)
8/2/2015 – 8/9/2015	18	18	6 (5 TAS employees and 1 W&I employee)
8/9/2015 – 8/16/2015	25	14	11 (All TAS employees)

Issues that may be of interest to the TAP:

1) Access and Service issues:

i. TAS continues to receive complaints about the Practitioner Priority Service lines. This month the issues were excessive hold time, rude phone assistants, and phone assistants that were unable to respond to the issues raised by the practitioners. The operating division continues to work on quality control and access issues and TAS will continue work with them to solve problems.

li. Unable to obtain assistance on the phones. This appears to be an across the board issue. Examples from the last 4 weeks worth of reports include: the practitioner wanted to speak to the ACS non-streamline section and was forced to speak with the ACS streamlined section first only to be transferred after holding for a lengthy period of time. The practitioner wanted to check the CNC status of an account and was forced to wait on hold for more than an hour. A suggestion from one of the Practitioner was for the IRS to provide an option for those tax professionals that know where they need to go the right to get to the



department without the hold and transfer option currently available.

2) Transcripts:

i. The estimated affected taxpayers for the “Get Transcript” breach has risen to 330K (up from 200,000 as of my last report). There is a statement available on irs.gov that explains what happened and what the IRS is doing for all affected and potentially affected taxpayers. The “Get Transcript” application remains inactive until further notice and taxpayers may request their transcript via mail. Letters will be sent to the newly identified taxpayers.

ii. TAS is receiving issues from taxpayer/practitioners that taxpayers are receiving transcripts that they didn’t order. The IRS is looking into these instances to determine if they are a result of the breach.

iii. IRS Commissioner Koskinen along with a representative from TAS will be participating at Senator Kelly Ayotte’s (R-NH) Budget Committee field hearing on the IRS’s handling of fraudulent tax returns in Manchester, NH. Senator Ayotte wanted Commissioner Koskinen to hear directly from New Hampshire residents that have been victims of identity theft. The hearing is scheduled for 2 p.m., Wednesday, August 26, 2015, at UNH Manchester Campus Room 201, 88 Commercial St., Manchester, NH. For the full press release on this upcoming event see Senator Ayotte’s senate page at www.ayotte.senate.gov, and this event is open to the media and the public.

Program Owner Report

Johnnie Beale attended the call for Bohler; he did not have anything new to report out.

Screening

There were three issues submitted to screening this month. This year there is less submission of issues so far. McPhilamy has reached out to a submitter but found that the issue was already resolved. McPhilamy discussed TAP with the submitter.

Activity Report

For the month of July, there were six outreach events reported by TAP members with an audience of 146 – two issues were received.

Mentoring

Robinette stated that McPhilamy is doing an outstanding Job.

Robinette stated that Persons is in travel status and will follow up with him to see how he is progressing.

Halleman also mentioned that Meade has not reached out to him for any assistance and stated that he is doing well.



Cooney stated that Ogden published an article introducing herself and discussing TAP in her hometown area of Utah. Cooney also mentioned that Scott-Baily will get more involved and she is reaching out to her.

Subcommittee Report – 1

Halleman mentioned that two of his subcommittee referrals have been accepted at the JC face to face meeting and have been forwarded to the IRS. He mentioned that his subcommittee is working on the following:

- Reduction in Services for the Practitioners Priority Services. Halleman also mentioned that the direct individual cost to get issues resolved by Practitioners increased the taxpayers cost to get issues resolved.
- Toll free line prompts to get to an assistor- this must be improved to help the taxpayer find an assistor quicker.
- Employer Identification numbers and social security numbers this information appears to be redundant- there should be some short cuts to avoid the redundancy.

Beale informed the members that the IRS is aware of the redundancy issues and that this issue is addressed in the 2016 IRS Budget to Congress. Beale also indicated that there is a cost associated with this.

Subcommittee Report – 2

This subcommittee met today; they are working on the reduction in service. They are waiting for Subject Matter Experts to respond with some information requested. Some of the major concerns are to decrease the wait time and inform taxpayers where they are in the queue.

Beale stated that there is a call back feature available for 2016 in the budget to congress and that there is a cost associated with the implementation. Halleman asked Beale if he can share a copy of the 2016 Budget to Congress providing a breakdown.

Public Participation

None

Outreach

Meade participated in at a tax forum in San Diego, CA. Halleman stated that he informed him that it was positive and received many issues.

Action Item: Beale will provide the Toll Free Committee with a copy of the 2016 IRS Budget to Congress.



Closing

Cooney reminded the members that if there are any suggestions they can think of to add to the JC discussion, please send her an email. Jeans thanked all for attending the teleconference and officially adjourned the meeting.

The next Toll Free Teleconference will be held on Wednesday, September 16, 2015, 2:30 p.m. ET; 1:30 p.m. CT; 12:30 p.m. MT; 11:30 a.m. PT.

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 15, 2015**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Analyst, W&I
- Johnnie Beale – Senior Program Analyst, W&I
- Tamara Birts – Senior Program Analyst, TAS
- Tamikio Bohler – Program Analyst, W&I (Absent)
- Cedric Jeans – Program Manager, DFO
- Linda Rivera – Senior Program Analyst, TAP

TAP Members

- Gretchen Cooney – Holstein, IA
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- Lonnie Mayer – Tripp, SD
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- Larry Meade – Sacramento, CA
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY (Absent)
- Keith Robinette – Ozark, MO
- Jacqueline Scott-Bailey – Columbia, SC
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI (Absent)

Welcome/Announcement

Cedric Jeans welcomed everyone and declared the meeting opened.

Roll Call

The minutes for June were approved with two minor edits for posting to www.improveirs.org.

National Office Report

Andrews thanked the members for their hard work; she mentioned some staff changes- Teresa Cook has returned to her business unit and Annette Johnson, has joined TAP on a detail for the next 180 days. Toni Ross from National Office has been permanently reassigned to TAP.

The Joint Committee's (JC) meeting is coming up in August. Andrews reminded the members to inform Cooney of any issues they would like to work on for 2016 to bring to the JC for discussion.

Andrews informed the members that the National Taxpayer Advocate will be submitting her Mid-Year Report to Congress this month. This report contains the road map of goals and activities for the TAS/TAP in the coming year. Andrews stated that the report will be available by late July-mid August for review by the TAP members.

The TAP Staff is working on connecting the Local Taxpayer Advocates with TAP members in their home state.

Chair Report

Cooney welcomed everyone to the teleconference and proceeded with the agenda.

Systemic Advocate Update

Birts provided the following SAMs report for the Toll Free Committee:

Week	Issues received	External Submitter	Internal Submitter
6/14/2015 – 6/21/2015	19	8	11 (All TAS employees)
6/21/2015 – 6/28/2015	17	5	12 (All TAS employees)
6/28/2015 – 7/4/2015	24	16	8 (7 TAS employees and 1 W&I employee)
7/5/2015 – 7/11/2015	23	11	12 (11 TAS employees and 1 W&I employee)

Issues that may be of interest to the TAP:

1) Access and Service issues:

i. Some practitioners are concerned that they are not receiving copies of notices sent to their clients despite having the correct authorization to receive these notices. This is an ongoing issue and has been raised to the CAF/POA office; however, it is difficult to troubleshoot without examples. Birts mentioned that the TAP can advise their constituents that if they have this problem it is helpful if they can obtain a copy of the notice from their clients which can then be provided to the CAF/POA unit to assist in finding a resolution.

ii. The IRS online payment plan application, which is called On-line Payment Arrangement (OPA), allows taxpayers who owe less than \$50,000 to apply for streamlined installment agreements but it is not working properly. This is causing undue burden as these taxpayers either have to call the IRS and wait on line for extended periods of time, hire a tax professional which can be costly, or send in a paper application which can be time consuming. This issue has been submitted in the past and is being worked as an information gathering project.

iii. The IRS has developed several notices to assist taxpayers that may have been affected by the Get Transcripts hacking incident. Specifically, approximately 200,000 taxpayers had suspicious activity on the Get Transcript application; an estimated 100,000 of these involved transcript requests that were obtained without the taxpayer's knowledge. The IRS is sending letters to all of the affected taxpayers including those listed as primary, secondary, dependents or others who have an SSN shown on the return.

The following are examples of the letters taxpayers will receive from the IRS:

Letter 4281-A *Get Transcript Incident – Impacted Taxpayer*, is directed to the taxpayer whose tax information was accessed. It offers the taxpayer an Identity Protection PIN by submitting a completed Identity Theft Affidavit, Form 14039. The letter offers the taxpayer free identity theft protection for one year from Equifax. The enrollment code for Equifax is included. Taxpayers are encouraged to notify one of the three credit monitoring companies to request a fraud alert on their credit line.

Letter 4281-B *Get Transcript Incident – Non-Impact Letter*, will be sent to taxpayers whose tax information was not compromised but their personal information was used. The letter informs the taxpayer that a third party who tried to access their account may have their personal information. This letter also provides general information about identity protection and steps they can take to protect their information.

Letter 4281-E *Get Transcript Incident – Impacted Minors Letter*. This letter is sent to the parents of dependents under age 18 (one letter per household) and informs them of the suspected fraudulent use of his or her dependents' personal information and the possibility that someone may misuse this information. . If the taxpayer wants to know if a credit file exists for their child, they can call Equifax. They can also request a fraud alert on the child's credit file by sending a copy of the child's birth certificate and a copy of the social security card along with a letter explaining the child may be a victim of identity theft.

Letter 4281-F *Get Transcript Incident – Alimony Spouse-Other*. This letter is addressed to other adults who have an SSN shown on the accessed transcript (such as spouse, adult dependents, ex-spouses who received alimony and childcare providers listed on Form 2441 *Credit for Child and Dependent Care Expenses*). The content is similar to the Letter 4281-A, above. The letter offers the taxpayer an Identity Protection PIN by submitting a completed Identity Theft Affidavit, Form 14039, free identity theft protection for one year from Equifax and includes the enrollment code. Taxpayers are encouraged to notify one of the three credit monitoring companies to request a fraud alert on their credit line.

Mayer asked Birts if it is possible to track who the notices are being sent to for CAF/PAO issues. Birts responded that due to system limitations notices are not always

tracked. Mayer suggested TAP advocate for a change. Birts stated that she will look into the issue and that the IRS keeps a list of requested system upgrades and as funding becomes available, the upgrades will occur. Due to limited funding, this means many items simply cannot be implemented.

Program Owner Report

Johnnie Beale attended the call for Bohler; he did not have anything new to report out.

Activity Report

For the month of June, there were 9 outreach events reported by TAP members with an audience of 70.

Mentoring

Robinette has not spoken to his mentees recently, but stated that he will follow-up. Cooney mentioned that Ogden is doing well.

Subcommittee Report – 1

The Referral has been submitted for approval to the JC. The Attorney Advisor has returned the referral with no additional changes suggested for the wording change. They are starting to work on the new project for the sub-committee.

Subcommittee Report – 2

The referral has been approved by the JC. They are starting to work on the new project work for the sub-committee.

Public Participation

None

Closing

Cooney reminded the members that if there are any suggestions they can think of to add to the JC discussion, please sent her an email. Jeans thanked all for attending the teleconference and officially adjourned the meeting.

The next Toll Free Teleconference will be held on Wednesday, August 19, 2015, 2:30 p.m. ET; 1:30 p.m. CT; 12:30 p.m. MT; 11:30 a.m. PT

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 17, 2015**

IRS Staff

- Sheila Andrews – TAP Director
- Tamara Birts – Senior Program Analyst, TAS
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Program Manager, DFO
- Rosemarie Rixey – Policy Analyst, W&I
- Kevin Brown – Management Assistant, TAP
- Linda Rivera – Senior Program Analyst, TAP

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO (Absent)
- Lonnie Mayer – Tripp, SD
- Gilberte Mayo – Lincoln, ME (Absent)
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO
- Jacqueline Scott-Bailey – Columbia, SC (Absent)
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Cedric Jeans welcomed everyone and declared the meeting opened.

Roll Call

Roll call was taken by Brown and quorum was met for this meeting. The minutes for May were approved for posting to www.improveirs.org.

National Office Report

Jeans reported that we are halfway finished with the recruitment process, specifically the interview process, is almost done. Jeans thanked everyone who has helped up to this point. The hope is to complete this within the next couple months. Jeans reminded everyone that we want to get our referrals completed before the TAP year ends in November. Jeans reported that the Joint Committee (JC) meetings are scheduled for the week of August 3, 2015, and members are encouraged to share with Gretchen Cooney any concerns they want her to bring up at these meetings.



Chair Report

Cooney welcomed everyone to the call. She expressed appreciation for the member's commitment to staying on track with the activity reports and other TAP activities.

Systemic Advocate Update

Tamara Birts reported on SAMS issue submissions for the last four weeks and they were 29, 19, 22, and 31. Birts reported that more of the submitters are external, which for the last four weeks are 14, 7, 13 and 11 of the previous totals. Birts also reported on four issues that might be of concern to the committee:

- 1) Centralized Authorization File (CAF)/Power of Attorney (POA) Issues:
There were complaints from the practitioner community that the Power of Attorney (POA) fax line was down during the Memorial Day weekend. The phone lines were down, but no reason was specified, and the CAF/POA staff is extremely busy trying to work issues as quickly as they can.
- 2) Complaints about the Affordable Care Act (ACA):
There were complaints about the shared responsibility payment being assessed for more than it should be. Taxpayers also reported problems with the second Lower Cost Silver Plan (SLCSP) amounts listed as zero being rejected by the IRS despite the taxpayers following the guidance provided in the Publication 974. The reason for these issues is still being researched.
- 3) The "Get Transcript" application has been taken down due to the hacking incident and taxpayers along with practitioners are complaining about the inconvenience and time required to obtain transcripts through other means. Taxpayers can visit their local taxpayer assistance centers, mail request or request by phone while the IRS continues to resolve this issue as quickly as they can.
- 4) There were complaints about the courtesy disconnect feature from taxpayers and practitioners who are willing to wait on the phone to resolve their tax issues but not allowed to. Birts reported that we are currently looking into this to find a resolution to this problem. Sean McPhilamy inquired about what triggers this function, but no one knows that at this time.

Program Owner Report

Tamirio Bohler reported that the Subject Matter Experts (SMEs) are being encouraged to take an active role on calls with TAP and provide the assistance that might be needed to further the committee's agenda. Bohler mentioned that on today a status request was sent to the IRS regarding the five items approved for TAP to work on. The update will be available to TAP as soon as the IRS responds. Bohler reported that a short response was provided regarding the "Get Transcripts" security issue.

Screening Team Report

Keith Robinette reported that the screening committee worked on three issues this month, all regarding the reduction in service. Two have been placed in the parking lot and the other is still being evaluated. Robinette reported that the complaints were not



reaching a live person, hold times and the system estimated hold announcements not being accurate at all.

Activity Report

Linda Rivera reported May 34.5 percent participation, 37.3 hours of outreach reported and 212 members of the public reached. There will be a change to the address for members to send their monthly report. The report will be sent to: taxpayeradvocacypanel@irs.gov. In addition, Rivera encouraged any committee member having a problem with the any part of the activity report, to reach out to her or Jeans for assistance.

Mentoring

Cooney mentioned one mentee doing well and the other having some issues that will need to be addressed soon. Robinette reported that both of his mentees are doing well this month even though he was not available as much as he wanted to be.

Subcommittee Report – 1

Rivera reported that the referral will be resubmitted to the JC during the June 2015 meeting. Rosemarie Rixey mentioned that this referral was potentially part of the National Taxpayer Advocate's (NTA) Most Serious Problems (MSPs) for this year and did not want there to be any redundancy issues. Jeans responded that the committee's report will be coming from the citizen's perspective and might be a bit different from the NTA's MSP. Jeans reported that SME's will be invited to future subcommittee meetings to ensure that we are staying on track with our referral.

Subcommittee Report – 2

McPhilamy reported that this referral will be going back to the JC next week for the June 2015 meeting. McPhilamy mentioned that the committee is eager to address their next issues concerning the long wait times on the toll free hotline and how the reduction of service is affecting taxpayers.

Public Participation

None

Closing

Jeans thanked all for attending the teleconference and officially adjourned the meeting.

**The next Toll Free Teleconference will be held on Wednesday, July 15, 2015 ET;
1:30 p.m. CT; 12:30 p.m. MT; 11:30 a.m. PT**

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 20, 2015**

IRS Staff

- Sheila Andrews – TAP Director
- Debra Awalt – Program Analyst, W&I
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Acting Program Manager, DFO
- Margaret Peniston – Senior Tax Analyst, SBSE
- Linda Rivera – Senior Program Analyst, TAP

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Gilberte Mayo – Lincoln, ME
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)
- Jacqueline Scott-Bailey – Columbia, SC (Absent)
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Jeans welcomed everyone and declared the meeting opened.

Roll Call

Roll call was taken by Babb. Quorum was met for this meeting. The minutes for April were approved for posting to www.improveirs.org.

National Office Report

Andrews stated that the TAP Staff is now in the interview phase of the application process. An email was sent to all TAP members to solicit volunteers for the interview process. Some have responded with their schedule of availability. Andrews thanks the members that have responded and those yet to respond.

The face to face meeting dates and times for 2016 have not been finalized. There is some research to be done in terms of the cost estimates and city that will host the meeting. An update will be provided when the determination has been made.

Chair Report

Cooney welcomed everyone to the teleconference. She expressed her appreciation for the member's commitment to staying on track with the activity report and other TAP activities.

Systemic Advocate Update

Birts stated that there was not much to report on this month. However, there were some SAMS submissions on various issues and the Systemic Advocacy is working on the two EITC topics to include in the Annual Report to Congress.

Program Owner Report

Bohler welcomed everyone to the call; she did not have anything new to report. She stated that things are going very well and thanks the committee for their work.

EITC Data

Peniston gave an overview of the EITC script data that is collected on call volume.

Activity Report

Halleman reported that for the month of April there were a total of four issues received from an audience of 56.

Mentoring

Halleman stated that he and Meade are on track to have discussions. Cooney tried to reach out to Scott-Baily; Ogden is holding her own very well.

Subcommittee Report – 1

Veal's subcommittee referral will be on the Joint Committee's (JC) calendar for this month.

Subcommittee Report – 2

McPhilamy subcommittee referral will be on the Joint Committee's calendar for this month.

New Projects

Subcommittee 1 will be working on Priority Practitioner helpline.
Subcommittee 2 will be working on reduction in services and long wait time.

Comments/Questions

Rivera stated that members should review the PowerPoint presentation on how to submit the Activity Report. If there are any questions, the members should consult with their mentor or TAP staff.



Activity Reports should be submitted timely; it is due on the twenty-fifth day of each month. Please contact Teresa.a.Cook@irs.gov or Kudiratu.A.Usman@irs.gov if there are any questions.

Jeans mentioned the Annual Report to Congress – he asked members to take a look at the Most Serious Problems (MSPs) regarding Practitioner Priority Project. There may be some references that can facilitate discussions on the next subcommittee teleconference.

Cooney will not be in attendance for the JC meeting next week; Halleman will be attending the meeting during her absence. Members are asked to submit any questions or comments for the JC to Halleman.

Outreach Events

Cooney and Ogden discussed outreach activities in their home state.

Public Participation

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

Closing

Cooney and Jeans thanked all for attending the teleconference.
Jeans, DFO officially declared the meeting adjourned.

The next Toll Free Teleconference will be held on June 17, 2015 EST.

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 15, 2015**

IRS Staff

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

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Mayo Gilberte – Lincoln, ME
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA (Absent)
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO (Absent)
- Jacqueline Scott-Bailey – Columbia, SC (Absent)
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Jeans welcomed everyone and declared the meeting opened.

Roll Call

Roll call was taken by Babb. Quorum was met for this meeting.

DFO Report

Jeans stated that the TAP Recruitment period on www.USAJobs.gov website will be closing on April 20, 2015. As of today, TAP has received 929 applications. Jeans asked members to continue to spread the word on recruitment.

Next Thursday, April 23, 2015, there will be training for chair, vice chair and subcommittee leads an email was sent out to the TAP committees.

The National Annual Tax Forums will be starting up again; TAP will be looking for volunteers to attend. The dates and locations are:

National Harbor (DC)	July 7 - 9
Denver, CO	July 28 - 30
San Diego, CA	August 11 - 13
Atlanta, GA	August 25 - 27
Orlando, FL	September 1 - 3

Chair Report

Cooney welcomed everyone to the teleconference. She asked the full committee to vote on the minutes. The members voted to approve the minutes for March with one minor edit before posting to www.improveirs.org.

Systemic Advocate Update

Birts provided an update of Systemic Advocacy Management Systems (SAMS) Issue Submission Report:

Week	Issues received	External Submitter	Internal Submitter
3/22/2015 – 3/29/2015	40	19	21 (All TAS employees)
3/29/2015 – 4/5/2015	41	20	21 (1 Appeals, 20 TAS)
4/5/2015 – 4/12/2015	40	22	18 (2 SBSE, 16 TAS)

Issues that may be of interest to the TAP were;

Reduction in Service Issues/Lack of Services or information:

1) Complaints that the Taxpayer Assistance Centers (TACs) no longer accept cash payments. Birts stated that she reviewed a few TAC pages by state and some accept cash while others accept certified checks and money orders only. The driving force appears to be staffing levels and if the taxpayers check the websites before walking in, it would be helpful.

2) Taxpayers are having problems passing authentication on www.idverify.irs.gov and these taxpayers are coming to Taxpayer Advocate Services (TAS) for assistance.

3) Concerns that federal payment levy program proceeds continue to be sent even after the Collection Status Expiration Date (CSED) has expired.

4) Problems with the Affordable Care Act (ACA) calculations resulting in erroneous offsets.

Program Owner Report

Bohler welcomed everyone to the call; she did not have anything new to report out on this call.

Activity Report

Halleman reported that for the month of March there was a total of 18 outreaches with 4 issues received and an audience of 296. A PowerPoint presentation is being worked on by the Joint Committee (JC) to enable members of all committees to complete the spread sheet including their outreach events. Once it becomes final, each committee will have a copy. Halleman reminded the members to send their monthly activity reports to Teresa.A.Cook@irs.gov and carbon copy to Kudiratu.A.Usman@irs.gov. He also stressed that it is imperative that the reports are submitted no later than the twenty-fifth day of each month.

Mentoring

Halleman stated that he did not reach out to Meade recently. However, he will be contacting him. Cooney will reach out to Scott-Baily. She has had contact with Ogden.

Subcommittee Report – 1

Veal's mentioned that she has submitted her subcommittee's referral to Rivera and it is now with the Quality Review Team.

Subcommittee Report – 2

McPhilamy stated that his subcommittee has made some changes to the referral form and will be updating it with some attachments.

Comments/Questions

Rivera stated that if the members have any questions for IRS media, please send them to her via email. She will assist the members with obtaining a response to their questions. Rivera also stated that there are some referrals in the pipeline for the JC meeting in May.

A new template will be rolled out with a list of issues for the full committee to review today via email; including two projects that Rivera is working on to assign to the subcommittee to work.

Public Participation

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

Dates and Events

Jeans and Rivera will send out a calendar link on the following:

- Chair Training on April 23, 2015.
- National Tax Forums – July through September.
- ID Theft Victim Webinar on May 12, 2015.
- At the next monthly teleconference on May 20, 2015, members will decide if they want to switch their current subcommittees.

Closing

Cooney and Jeans thanked all for attending the teleconference.
Jeans officially declared the meeting adjourned.

The next Toll Free Teleconference will be held on May 20, 2015, 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
March 18, 2015**

IRS Staff

- Sheila Andrews – TAP Director (Absent)
- Debra Awalt – Program Analyst, W&I
- Rose A. Babb – Management Assistant, TAP
- Tamara Birts – Senior Program Analyst, TAS
- Tamikio Bohler – Program Analyst, W&I
- Naomi Mbuqua – Dillard- Supervisory Tax Analyst
- Cedric Jeans – Acting Program Manager, DFO
- Margaret Peniston – Senior Tax Analyst
- Cindy Jones – Supervisory Program Analyst
- Linda Rivera – Senior Program Analyst, TAP

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD
- Mayo Gilberte – Lincoln, ME
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO
- Jacqueline Scott-Bailey – Columbia, SC
- Angela Veal – Byron, GA
- Dawn Welles – Milwaukee, WI

Welcome/Announcement

Jeans welcomed everyone and declared the meeting opened.

Roll Call

Roll call was taken by Babb. Quorum was met for this meeting.

DFO Report

Jeans stated that the TAP Recruitment is now opened on www.usajobs.gov from (March 9, 2015 until April 20, 2015). Jeans asked members to visit www.improveirs.org to see the link to www.usajobs.gov and invite their neighbors, friends and associates to view the announcement.

Jeans thanked the members for their participation in the face to face survey.

Chair Report

Cooney welcomed everyone to the teleconference. She asked the full committee to vote on the minutes. The members voted to approve the minutes for January and February with a minor edit before posting to www.improveirs.org.

Systemic Advocate Update

Birts provided an update of Systemic Advocacy Management Systems Issue Submission Report:

Week	Issues received	External Submitter	Internal Submitter
2/22/2015 - 2/28/2015	No report received	---	----
3/1/2015 - 3/7/2015	64	36	28 (27 TAS, 1 W& I)
3/8/2015 - 3/15/2015	40	23	17 (All TAS)

The issues are varied in topic but of interest for the TAP sub-teams:

(A) Earned Income Tax Credit (EITC) issues:

- (1) Concerns with how to report fraud when it is detected
- (2) How fix denials when claimed by farmers
- (3) Processing concerns when the IRS computer coding does not pick up the EITC freeze for certain taxpayer accounts.

(B) Filing Season issues:

- (1) Lack of access to IRS via telephone: busy outs, excessive hold times or the wait time is excessive and, taxpayers are unable to go to the www.irs.gov website for assistance.
- (2) Refund delays, which is every year but note that some of this is due to taxpayer error.

Program Owner Report

Bohler welcomed everyone to the call; she did not have anything new to report out on this call. She thanked the Toll-Free committee for their work.

Screening Reports

Robinette stated that his Screening Team met this week; they reviewed two new issues. 1 issue was related to IRS personnel and the other issue was related to EIN #, both issues were closed. There was one issue identified for a call back and Cooney will attempt contact. The committee then reviewed the follow-up actions from the previous month's issues. Four contacts were made successfully and two submitters did not reply to the contact attempt.

Activity Report

Halleman reported that 287.5 hours were logged in for the full committee work on outreach activity for the month of February. There were 54 outreach events with an audience of 1,282.

Rivera reviewed the revised Activity Reports requirements with the Toll-Free members. The revised report will be used commencing this month. The due date has also been revised until the twenty fifth of the month. The reports will be emailed to Teresa.A.Cook@irs.gov and carbon copied (cc'd) to Kudiratu.A.Usman@irs.gov. Rivera also advised the members that she had already sent each of them a copy of their report with the outreach activity populated on the form for December, January and February. They were also advised that it was a rolling report that would capture all their hours as reported. Rivera finally added that the Outreach Chair, Andrew VanSingel has requested that all members submit their reports in a timely fashion.

Mentoring

Halleman stated that he did not reach out to Meade since the last teleconference. However, if Meade needs to contact him, he is always available.

Robinette stated that McPhilamy is doing well.

Cooney has reached out to Scott-Bailey and to Ogden; they are doing well.

EITC Audit Phone Line

Subcommittee Report – 1

Veal's subcommittee is working the Time Out issue for Taxpayers who call the Internal Revenue Service. A Subject Matter Expert will provide some statistics that will enable Veal's subcommittee to complete their review. This committee has moved forward and has prepared a first draft of their referral. They are in the process of completing additional items before submission to the QR Team and Attorney advisors for review. The goal is to complete and submit the referral to the Joint Committee (JC) for approval in April.

Subcommittee Report – 2

McPhilamy stated that his subcommittee met and, had a discussion. The subcommittee has now prepared a first draft referral. They are in the process of completing additional items before submission to the QR Team and Attorney advisors for review. The goal is to complete and submit the referral to the JC for approval in April.

Outreach Report

Peniston entertained questions on the Time Out issue worked by Veal's subcommittee; she provided a breakdown of how the telephone script responds to taxpayer's; she discussed the steps that the script goes through in order to connect the taxpayers. Peniston also stated that the calls are never set up to disconnect but rather, to be routed finally to an assistor. They will provide the members with additional statistical information on the time out reporting.

Public Participation

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

Action

Members should make a calendar reminder for the monthly report submission to TAP Analyst Cook and Usman. Rivera will send out a calendar invite to all of her Toll-Free Members to submit their “activity reports on the twenty fifth of each month”. This may help to improve the timely submission of the reports for the group.

Rivera will work with Mbuqua-Dillard on the email she sent to solicit any additional information from the members.

Closing

Cooney and Jeans thanked all for attending the teleconference.
Jeans, DFO officially declared the meeting adjourned.

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
February 18, 2015**

IRS Staff

- Sheila Andrews – TAP Director
- 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

TAP Members

- Gretchen Cooney – Holstein, IA
- Dan Halleman – Thornton, CO
- Lonnie Mayer – Tripp, SD (Absent)
- Gilberte Mayo – Lincoln, ME
- Sean McPhilamy – Talkeetna, AK
- Larry Meade – Sacramento, CA
- Joan Ogden – Salt Lake City, UT
- Daniel Persons – Brooklyn, NY
- Keith Robinette – Ozark, MO
- Jacqueline Scott-Bailey – Columbia, SC
- Angela Veal – Byron, GA (Absent)
- Dawn Welles – Milwaukee, WI (Absent)

Welcome/Announcement

Jeans welcomed everyone to the first teleconference of the year and declared the meeting opened.

Roll Call

Roll call was taken by Babb. Babb mentioned to the full committee that if they choose to sign their vouchers for outreach or future meetings reimbursements can be signed electronically, the IRS will accept it as their official signature.

Minutes

The minutes from the face to face meeting in January were approved by the full committee for posting to www.improveirs.org.

National Office Report

Andrews welcomed the members and stated that Steve Berkey, Analyst in TAP has accepted a promotion in SA. Starting the week of February 21, 2015, there will be three analysts coming to TAP on details. One of the analysts is a former TAP employee from



Seattle, Washington, Janice Spinks; the other two analysts are Teresa Cook and Retha Blumhagen. Andrews also informed members that TAP is planning a virtual meeting for all members on March 12, 2015. An email and calendar invite will be sent out within the next day of this meeting.

DFO Report

Jeans mentioned that the TAP is in the process of developing a revised outreach report document for all members to input their outreach activities including hours spent. This revised spread sheet will condense both tabs into one, making it more comprehensive for all members. Jeans mentioned that the spreadsheet will be presented to the Joint Committee on February 25, 2015, for their review and approval. Once approved by the Joint Committee (JC), each committee will have immediate access to the revised report.

Jeans stated that the recruitment for 2015 is in the final development stages. TAP is working with the Human Capital Office to have the application process listed on www.usajobs.gov. Members will be informed when it has been finalized so that they can inform their neighbors and friends.

Press Release

The updated Press release for the new TAP members should be posted on www.improviors.org.

Chair Report

Cooney welcomed everyone to the teleconference. She began by asking members if they cannot attend a monthly teleconference at any time, they should inform her and analyst, Rivera. Cooney also informed members that this is an administrative meeting therefore; no decisions will be made for this meeting.

Systemic Advocate Update

Birts provided an update of Systemic Advocacy Management Systems Issue Submission Report:

Week Issues Received External Submitter Internal Submitter

2/1/2015 – 2/7/2015 46 30 16 (14 TAS, 1 W&I, 1 Other)
2/8/2015 – 2/14/2015 44 24 20 (18 TAS, 1 SBSE, 1 W&I)

The National Taxpayer Advocate's (NTAs) 2014 Annual Report to Congress is currently reviewable by logging on to www.irs.gov/advocate and selecting NTA reports under the reports and information tab. Members are strongly asked to take a look at the NTA's report.

(A) The PPS line refused to provide transcripts unless the caller attempted to use online transcript services first. Wait times are reported as excessive. We are talking as much as 1.5 hours and so common that some POA's are now calling the general 1040 lines for assistance and getting through faster.

(B) There are excessive wait times experienced by CPA firms.

Program Owner Report

Bohler welcomed everyone to the call; she did not have anything new to report out on this call.

Screening Reports

The screening committee met and screened eight issues. All issues were dropped except for one, which was selected to be worked by the committee. Committee members will contact all of the issue submitters that provided their personal contact information.

Mentoring

Halleman stated that he reached out to Meade to bring him up to speed on the face to face meeting and to provide mentorship.

Robinette stated that he reached out to McPhilamy and Persons; they have established some communication on mentorship.

Cooney has reached out to Elizabeth Scott-Baily and to Joan Ogden to establish mentorship.

Toll Free Project Focus

The Toll Free Committee has been tasked with reviewing the EIRC Toll Free Audit Script. The Committee was divided into two separate subcommittees:

Subcommittee Report – 1

This committee has been tasked with The EITC Audit Script Process and Flow.

Subcommittee Report – 2

This committee has been tasked with the revision of the verbiage.

Outreach Report

Halleman reported that just four members of the full committee have submitted outreach reports for the month. Three hours of outreach was completed with an audience of over 1000 contacts; no issues were identified at the event.

Public Participation

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

Rivera reminded the members that it is imperative that they try to attend all the teleconferences. Quorum is needed to vote on issues or make decisions.



There were four reports on outreach received. All members need to submit monthly reports. This captures the time that was used even on one on one situation where a member may have discussed outreach in a less formal setting.

Action

Please inform the staff if you wish to use another email address aside from your email address.

Members will be receiving marketing materials from Babb.

Closing

Cooney and Jeans thanked all for attending the teleconference and declared the meeting closed.

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

**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
January 12-13, 2015**

IRS Staff

- Linda Rivera – Senior Program Analyst, Washington, DC
- Otis Simpson – Program Analyst, TAP, Washington, DC
- Robin Owsley – Program Analyst, TAP, Indianapolis, Indiana
- Tamikio Bohler – Program Analyst, W &I, Atlanta, GA
- Antonia Cochran – Program Analyst, W &I, Atlanta, GA
- Leatta Phillips – Program Analyst, W &I, Atlanta, GA

TAP Members Present

- Ken Armstrong, TAP National Chair (2014), Kalispell, Montana
- Gretchen Cooney, Chair, Holstein, Iowa
- Dan Halleman, Vice-Chair, Thornton, Colorado
- Keith L. Robinette, Ozark, Missouri
- Dawn Welles, Milwaukee, Wisconsin
- Angela Veal, Byron, Georgia
- Daniel Persons, Brooklyn, New York
- Sean McPhilamy, Talkeetna, Alaska
- Joan Ogden, Salt Lake City, Utah
- Jacqueline Scott-Bailey, Columbia, South Carolina

TAP Members Absent

- Lonnie Mayer, Tripp, South Dakota
- Larry Meade, Sacramento, California
- Gilberte Mayo, Lincoln, Maine

Members of the Public

Ethelena Persons

Welcome

Otis Simpson, Designated Federal Official (DFO), opened the meeting, welcoming each participant.

Welcome/Announcements

Robin Owsley took roll as the participants introduced themselves.

Chair Elections

Chair and vice chair elections were held:

Action Item: Gretchen Cooney elected as committee chair and Dan Halleman elected as vice-chair.

Administrative Information

Linda Rivera explained and discussed the following committee information:

- Staff roles and responsibilities.
- Communication methods.
- Ground Rules and Telephone Etiquette.
- Establishing Meeting Quorum.
- Consensus Meeting Survey Assessment.
- Time Reporting.
- General information on travel.
- Minutes and minutes approval was also discussed.

Monthly Meeting Schedule

The monthly meeting time was scheduled for the year.

Action Item: The Full Committee meeting was scheduled for each third Wednesday of every month from 2:30 p.m., until 3:30 p.m., (ET).

Quorum

Quorum for the Toll-Free committee will be 50 percent of 12, plus one, which is 7.

Minutes

Gretchen Cooney presented the November 2014 minutes, which were approved by the committee.

Outreach

Dan Halleman will be the outreach representative for the Toll-Free committee. As such, Halleman will present the outreach statistics on each call, as well as participate on the outreach conference call each month.

An Outreach Materials Order Form was circulated among the membership for ordering outreach supplies for each member for FY-2015. The supply request will be ordered by the designated TAP staff for the members.

Quality Review (QR)

The QR team will meet ad hoc, as needed.
Joan Ogden, Gretchen Cooney, Dan Halleman.

Screening Issues

Linda Rivera discussed the following committee responsibilities:

- Screening an Issue.
- New Issue Screening Report.
- Conducted a Screening Exercise.
- Reviewed Toll-Free Screening Reports, as provided by the analyst.

Project Overview

Linda Rivera discussed the FY-2015 Project Focus. Tamikio Bohler, Program Analyst, Wage and Investment (W &I) attended the face to face meetings in person. Subject Matter Experts (SME)s for W&I, Antonia Cochran and Lea Phillips presented a workshop on the Earned Income Tax Credit (EITC) Audit Process and Toll-Free message.

Focus Groups

Two subcommittees were formed and the groups will focus on the following EITC Audit Process Program Areas:

- Review of the Initial Notice
- Review of the Notice Package-Language simplicity
- Review of the Notice Package-Difficulty of Compliance
- Identify Non-Compliance for recommendations
- Testing of Each Prompt
- Script Review

Issues

Two new Toll-Free issues were distributed to the members for review. A discussion of these specific issues will be held during the first screening call scheduled in February.

Comments from the Public

There were no comments from the public attendee, Ethelena Persons.

Closing

Panel members were given the opportunity for feedback on the meeting. Panel members were advised that a formal survey would be distributed for their completion, after the face to face meeting.

The Chair and DFO closed the meeting.

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