



## 2017 Meeting Minutes Toll-Free Phone Line Project Committee

- Nov. 15, 2017
  - Oct. 18, 2017
  - Sept. 20, 2017
  - Aug. 16, 2017
  - July 19, 2017
  - June 20, 2017
  - May 22, 2017
  - April 19, 2017
  - March 20-21, 2017
- 

### Toll-Free Phone Line Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes Nov. 15, 2017

#### **TAP Staff**

- Cedric Jeans – Designated Federal Official (DFO)
- Susan Jimerson – Acting TAP Director
- Fred N. Smith – Jr., Program Analyst
- Rose A. Babb – Management Assistant
- Rosalind Matherne – Program Analyst

#### **IRS Staff**

- Tamikio Bohler – W&I Operation Support
- Debra Awalt – W&I Program Coordination & Support

#### **TAP Members**

- Alice Azzaro – Wellington, FL – Vice Chair
- Timothy Bolin – Cheyenne, WY – Chair
- Richard “Kent” Christensen – Boise, ID
- Angel Hower – Norwalk, IA (Absent)
- Harold (Hal) Manasa – Henderson, NC (Absent)
- Zanobia Oliver – Box Elder, SD
- Sean McPhilamy – Talkeetna, AK
- Joan Ogden – Salt Lake City, UT
- Kimberly Pierre – Spring, TX (Absent)
- Daniel Persons – Brooklyn, NY
- Kathy David – Albuquerque, NM (Absent)



### **Guest**

Linda Rivera – IRS Senior Commissioner Representative

### **DFO**

Jeans welcomed everyone and declared the call open.

### **Public**

There were no members of the public on the call.

### **Roll Call**

Babb conducted roll call for the meeting. Quorum was met.

### **Chair Welcome Announcements**

Bolin welcomed everyone to the last teleconference call for the full Toll-Free Phone Line Project Committee Meeting for 2017. This is Bolin's last act as chair of the Toll-Free Phone Line Project Committee; he expressed his appreciation and highlighted some of the members' accomplishments during this year. He thanked them for their individual commitment as well.

### **Meeting Minutes**

The minutes for October were approved for posting to [www.improveirs.org](http://www.improveirs.org).

### **National Office Report**

Jimerson is the Acting Director for the month of November until a permanent director is selected. She welcomed the members to the last project committee meeting for 2017. Jimerson thanked the committee for their outreach topics referrals and all the assignments that they have worked on this year. She expressed her appreciation as well to those members that are rotating off of the panel.

She mentioned the following:

- The recruitment package has been sent to the Department of Treasury and is awaiting approval for the 2018 TAP membership.
- For those members rotating off the panel, they will be given Presidential Awards for their work in outreach and other TAP activities.
- The Internal Communications Committee had a call yesterday to discuss celebrating old members and new members coming into TAP.
- TAP staff will be sending out an email this week to solicit the members first, second and third choice of project committees they wish to serve on. If returning members wish to remain on the same committee, they may also indicate that as their first choice to be accommodated.
- Retiring members can volunteer to be mentors to new members; the retiring members can inform the TAP staff if they wish to do so.

### **DFO Report**



Jeans acknowledged each member and Bolin for his leadership in the committee. He stated that TAP members are the blue print on how the committees go forward.

- Jeans highlighted the Best Practice of Outreach done for the last three years by Daniel Persons; he noted that he is a great example. Persons was asked if he can continue with the TAP mission after he rotates off.
- The members were asked to encourage others in their home state to apply for the volunteer positions on the TAP.
- The end of year TAP survey will be emailed to all members; please submit suggestions for improvement. This will enable TAP to make changes that benefits the program objectives.
- Jeans asked the members rotating off if they have any objections to providing incoming members with their contact information as a mentor/resource through their transition.
- Remember to email the TAP staff first, second and third choice of project committee for 2018; if members wish to change their current committee they can.
- Continue to turn in outreach reports by the twenty-fifth day of each month.

### **Program Owners Report**

Bohler thanked the members for their work with Wage and Investment (W&I) and their accomplishments to the IRS.

Awalt thanked the members for their work to W&I, she mentioned that the members have given their perspective of the Taxpayer and have become the voice of the IRS. Awalt thanked Ogden whom she has worked with for some time directly.

### **Activity Report**

Azzaro mentioned that there are still a few referrals that are being worked; she will share the responses with the retiring members as they become available. Azzaro also asked the retiring members to continue to return any comments on those referrals that they have worked on when they receive feedback from the committee.

There are still some errors/issues with the Outreach Report submission; Azzaro indicated that she will reach out to the members to verify and correct the hours reported on the spreadsheet.

There are lots of opportunities for members to conduct outreach, AARP, VITA, H&R Block and Jackson Hewitt. The members can take advantage of these organizations and similar outreach opportunities.

Facebook on TAP – Use social media for TAP, this is another great way to reach out to hundreds of people. Azzaro is available to provide assistance with social media outreach if members are interested.



### **Subcommittee 1 – Report Out**

Issue 36641 – Azzaro stated that her subcommittee is still working on this issue. A second meeting scheduled for Dec. 13, 2017, to review this issue. Azzaro suggested that a focus group may be necessary to get additional information to complete the work. Awalt suggested consulting with a subject matter expert (SME).

### **Subcommittee 2 – Report Out**

Issue 35594 – Some revisions were done and this issue will be presented to a SME, and the Attorney Advisor subsequently. The committee has motioned that subsequent to both reviews, this referral can to the Joint Committee for approval.

### **Toll Free Action Items Summary**

- Members are asked to reach out to their neighbors and friends in those states that are difficult to recruit members.
- Remember, retired members can reapply to the TAP after three years.

### **Closing Comments**

- Smith thanked all the members and those that are rotating off for their work on the committee.
- Rivera, who worked with the committee members prior to Smith, thanked the members for their work.
- The members expressed their appreciation to the TAP Staff.

Jeans thanked everyone and closed out the meeting; there are no more full Toll-Free Phone Lines Project Committee public meetings for 2017.

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Oct. 18, 2017**

**TAP Staff**

- Cedric Jeans – Designated Federal Official (DFO)
- Fred N. Smith, Jr. – Program Analyst
- Rose A. Babb – Management Assistant
- Rosalind Matherne – Program Analyst
- Robert Rosalia – Program Analyst
- Gretchen Swayzer – Program Analyst

**IRS Staff**

- Tamikio Bohler – W&I Operation Support
- Debra Awalt – W&I Program Coordination & Support

**TAP Members**

- Alice Azzaro – Wellington, Florida – Vice Chair
- Timothy Bolin – Cheyenne, Wyoming – Committee Chair
- Richard “Kent” Christensen – Boise, Idaho
- Angel Hower – Norwalk, Iowa
- Harold (Hal) Manasa – Henderson, North Carolina (Absent)
- Zanobia Oliver – Box Elder, South Dakota
- Sean McPhilamy – Talkeetna, Arkansas
- Joan Ogden – Salt Lake City, Utah
- Kimberly Pierre – Spring, Texas (Absent)
- Daniel Persons – Brooklyn, New York
- Jimit Shah – Bethpage, New York (Absent)
- Kathy Davis – Albuquerque, New Mexico

**Public**

There were no members of the public on the call.

**Roll Call**

Babb conducted roll for the meeting. Quorum was met.

**Minutes**

The minutes for September were approved with a minor edit for posting to [www.ImproveIRS.org](http://www.ImproveIRS.org).

**Opening**

Swayzer was acting Designated Federal Official for this meeting; she welcomed everyone and declared the call opened.



## **Welcome/Announcements/Comments/Acknowledgement of Citizens**

Bolin welcomed everyone and proceeded with the agenda.

### **National Office Report**

Jeans provided the National Office Report; he informed the members that he is the TAP Acting Director for the month of October. A decision will be made on the new TAP Director by November. He stated the following:

- There are two more Joint Committee (JC) meetings left for the rest of the TAP year. In addition, there will be a second JC Meeting held on Nov. 17, 2017. This meeting is scheduled to discuss referrals in the project committees that may be workable and submitted before the TAP year ends on Nov. 30, 2017.
- The recruitment is in its final stages; the package will be sent to the National Taxpayer Advocate's Office for approval.
- Outgoing TAP members would like to have a transitional discussion with incoming TAP members; this process will be beneficial to the new members with regard to conducting outreach and connecting with their local taxpayer advocate in their respective home states.
- All members will be receiving the TAP yearly survey via email within the next week; they are asked to complete the survey questions and after completion, return to Jeans via email. Jeans informed the members that the JC will be reviewing the comments submitted by the committees. The survey response helps to improve the TAP program.
- Analyst Lisa Billups has sent out an email with an informative video for members to view; the topic covers general IRS disaster assistance and reconstructing records after a disaster.

### **DFO Comments**

Swayzer discussed the following:

The TAP chair and vice chair nominations are open to all members. Analyst Swayzer is coordinating this process; an email was sent to all TAP members on Sept. 26, 2017 on the election process. See below the schedule events and days:

<b>Overview of TAP Chair and Vice Chair Elections Events and Dates</b>	
Informational Session on Being a TAP Chair or TAP Vice Chair	Tuesday, Oct. 17, 2017 at Noon – 1 p.m. ET
Nominations and Self-Nominations Due	Thursday, Oct. 19, 2017
Acceptance of Nominations Due	Friday, Oct. 20, 2017
Campaign Statements Due	Monday, Oct. 23, 2017
Campaign Statements Posted to TAPSpace	Tuesday, Oct. 24, 2017
Meet the Candidate Session	Tuesday, Oct. 24, 2017 at 2 – 3 p.m. ET
Ballots Sent to All Members	Thursday, Oct. 26, 2017
Votes/Completed Ballots Due	Tuesday, Oct. 31, 2017
Results Announced	Thursday, Nov. 2, 2017

### **Program Owners Report**

Bohler did not have anything new to report.

### **Activity Report**

- Persons so far have submitted the largest audience for outreach events for the Toll-Free Committee.
- Members are reminded to use the new and improved IRS website.
- Social media is an easy way to conduct outreach.
- Ogden mentioned that another source of outreach for members is to explore their neighborhood.

### **Subcommittee 1 – Report Out**

- Issue 36641 – ***Toll-Free Phone Line Support for Private Debt Collection*** – Azzaro mentioned that her subcommittee discussed doing some more research on the issue.
- Issue 35872 – ***PSA AM Assistors*** – Azzaro mentioned that this issue was revised and approved by her subcommittee and was subsequently approved by the JC.

### **Subcommittee 2 – Report Out**

Issue 35594 – ***FIRE Line and the ITIN Line*** – Hower mentioned that her subcommittee is working on making recommendations for this issue.

### **Parking Lot**

Smith stated that the inventory is very low. He suggested the when the members conduct outreach, be sure to talk to taxpayers to solicit grass root issues. Smith also suggested a conversation will be more meaningful in addition to the TAP suggestion form that is normally provided at outreach events.



### **Toll-Free Action Items Summary**

- If members have suggestions on how to mentor to new members, Bolin is asking that they share that information via email to him and Smith.
- The face-to-face meetings will be next as TAP approaches the end of the year.
- There will be another TAP meeting on Nov. 17, 2017, in addition to the standing monthly meeting on the fourth Thursday each month.
- The JC will be reviewing the TAP member survey responses and provide feedback on the results to the members.

### **Closing**

Swayzer thanked everyone for joining the call and declared the meeting closed. Bolin thanked everyone for joining the call.

**The next Toll-Free Phone Line Project Committee call will be on Nov. 15, 2017, 2:30 p.m. ET. This is the last call for the committee for 2017.**

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





**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Sept. 20, 2017**

**TAP Staff**

- Rose A. Babb – Management Assistant
- Cedric Jeans – Designated Federal Official (DFO)
- Susan Jimerson – Chief, TAP West
- Rosalind Matherne – Staff Analyst
- Robert Rosalia – Program Analyst
- Fred N. Smith, Jr. – Program Analyst

**IRS Staff**

- Tamikio Bohler, W&I Operation Support
- Debra Awalt, W&I Program Coordination & Support, Absent

**TAP Members**

- Alice Azzaro – Wellington, Florida
- Timothy Bolin – Cheyenne, Wyoming
- Richard “Kent” Christensen – Boise, Idaho
- Kathy Davis – Albuquerque, New Mexico
- Angel Hower – Norwalk, Iowa
- Harold (Hal) Manasa – Henderson, North Carolina
- Sean McPhilamy – Talkeetna, Arkansas
- Joan Ogden – Salt Lake City, Utah
- Zanolbia Oliver – Box Elder, South Dakota
- Kimberly Pierre – Spring, Texas
- Daniel Persons – Brooklyn, New York
- Jimit Shah – Bethpage, New York – Absent

**Public**

There were two members of the public, Todd Simmens and Kathy Stopyre.

**Opening**

Jeans opened the meeting and welcomed everyone to the call.

**Roll Call**

Babb conducted roll call for the meeting. Quorum was met for this meeting.

**Approval of August Minutes**

The minutes were approved by the full committee for posting to [www.ImproveIRS.org](http://www.ImproveIRS.org).

**National Office Report**



Jimerson joined the call and informed the members that Hernandez is detailed out and that she is the Acting TAP Director for the month of September. Subsequent to her acting assignment, Jeans will be the Acting Director for October. A TAP Director will be chosen at the end of October.

The TAP chair and vice chair nominations are open to all members. Analyst Swayzer is coordinating this process and will be sending emails to all members to nominate someone or self-nominate.

The TAP Chair Report was due on Sept. 15, 2017; that has started the production cycle for the TAP Annual Report for 2017. The recruitment process is ready to move on to the National Taxpayer Advocate's office for approval. Some background checks are still ongoing for prospective members.

There are three more Joint Committee meetings left for the rest of the TAP year; Jimerson suggested that any referrals that need to be reviewed by the Quality Review (QR), Systemic Advocacy (SA) and Attorney Advisors (AA), should be given to the Joint Committee (JC) before Nov. 30, 2017.

The IRS has launched a new and improved website; members are asked to take a look and provide any feedback that can help to improve the site's function for the public. Activity Reports are very important; they enable the tracking of the hours spent conducting outreach, sending emails and correspondence to TAP staff. These activities count toward the third year members; it determines the type of presidential award members can receive.

Beginning 2018, the Local Taxpayer Advocates will hold a quarterly problem solving meeting; taxpayers will have the opportunity to call in with questions.

### **Welcome/Announcements/Comments/Acknowledgement of Citizens**

Bolin welcomed all to the meeting. He provided the following highlights from the JC face-to-face meeting on the IRS new and improved website:

- There has been a drop in fraudulent filings.
- Be aware of scams coming from what appears to be "Legitimate Sources."
- Taxpayers can set up online accounts to make their tax payments.

### **Program Owners Report**

Bohler stated that Susan Powers, Director of W&I is retiring; Toni Cross will be the new Acting Director in W&I.

Hot IRS News: (located online)

There are changes to the Individual Taxpayer Identification Number (ITIN) program located on [www.irs.gov](http://www.irs.gov) – For 2016 returns, ITINs not used on a federal income tax



return in the last three consecutive tax years have expired, based on The Protecting Americans from Tax Hikes Act of 2015 (PATH Act). Additionally, ITINs issued before 2013 need to be renewed, starting with those with middle digits of 78 and 79.

Wage & Investment (W&I) posted consumer alerts on the Tax Compliance Act on [www.irs.gov](http://www.irs.gov); in addition, W&I posted information on how to verify that the IRS is calling taxpayers – on <https://www.irs.gov/newsroom/how-to-know-its-really-the-irs-calling-or-knocking-on-your-door>

The 2017 Statistics of Income (SOI) Report which shows recent data on USA (and International) tax information is online via: <https://www.irs.gov/statistics/soi-tax-stats-statistics-of-income>.

### **Activity Report**

Azzaro mentioned that there are still some calculation issues and that she will email the full committee to assist her with their report. Some reports are missing were not submitted. Ogden and Persons are doing a great job reaching out to various organizations.

### **Subcommittee 1 – Report Out**

Issue 35872 – ***Accounts Management (AM) Assistors*** – This issue will be sent to the JC once Azzaro reviews Ogden's QR edits. The edits will be incorporated into the issue and then sent back to the sub-committee for final review. If this could be done by Thursday, Sept. 21, 2017, Smith would then forward to Analyst Swayzer to include in the agenda for next week's JC meeting. If this deadline cannot be met, then the issue will be on the JC agenda for October.

### **Subcommittee 2 – Report Out**

Issue 36206 – ***Area Code/Time Zone Restrictions*** – This issue will be restructured and subsequently be resubmitted to the JC for consideration.

### **Screening Committee Report Out**

The screening committee did not meet this month to screen issues; however, they committee will reconvene on Oct. 5, 2017.

### **Closing of the Meeting**

Jeans thanked everyone for their participation on the all and officially closed the meeting.

**The next Toll-Free Phone Line Project Committee Meeting will be on  
Oct. 18, 2017 at 2:30 p.m. ET.**

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Aug. 16, 2017**

**TAP Staff**

- Javier Hernandez, Acting TAP Director
- Cedric Jeans, Designated Federal Official (DFO)
- Fred N. Smith, Jr., TAP Committee Lead Analyst
- BJ Burleigh, Employee Support and Development Secretary
- Rosalind Matherne, Management and Program Analyst

**IRS Staff**

- Tamikio Bohler, W&I Operation Support
- Debra Awalt, W&I Program Coordination & Support
- Rosemarie Rixey, W&I Customer Acct Services

**TAP Members**

- Alice Azzaro, Wellington, FL – Acting Committee Vice Chair
- Daniel Persons, Brooklyn, NY
- Joan Ogden, Salt Lake City, UT
- Kathy Davis, Albuquerque, MN
- Kimberly Pierre, Spring, TX
- Richard “Kent” Christensen, Boise, ID – National Chair
- Timothy Bolin, Cheyenne, WY – Committee Chair
- Zanobia Oliver, Box Elder, SD

**Absent**

- Angel Hower, Norwalk, IA
- Harold (Hal) Manasa, Henderson, NC
- Jimit Shah, Bethpage, NY
- Sean McPhilamy, Talkeetna, AK
- Rose Babb, Secretary – TAP

**Public**

There were no members of the public on the call.

**Roll Call**

BJ Burleigh conducted roll for the meeting. Quorum is met.

**Opening**

Cedric Jeans opened the meeting and welcomed everyone to the call.



### **National Office Report**

Javier Hernandez shared that TAP recruitment is going very well currently staff is conducting meetings and making the 2018 member recommendations.

Hernandez will attend the Joint Committee (JC) face to face (F2F) meeting in Memphis, TN, August 22-23, 2017 to discuss improving TAP resources for FY2018. Hernandez will attend TAP staff F2F meeting to review the TAP member recommendations to make TAP and even better success.

Hernandez thanked the committee for the variety of effective outreach efforts they are participating to increase TAP's exposure to the public.

### **National Office Report / Designated Federal Official Report**

Cedric Jeans shared that December 1, 2017, is the beginning of the next TAP year current committee members are asked to have their projects ready to close out by November 30, 2017, where possible.

The technical issues that effected [www.TAPSpace.org](http://www.TAPSpace.org), [www.tapspace.org](http://www.tapspace.org), and [www.ImproveIRS.org](http://www.ImproveIRS.org) have been resolved. If members find they are having problems accessing please contact Smith or Jeans.

Members needing outreach supplies should send requests to Cedric Jeans, Fred Smith, and Rose Babb.

### **Welcome/Announcements/Comments/Acknowledgement of Citizens**

Timothy Bolin welcomed everyone to the meeting. Angel Azzaro and Bolin will be attending the TAP staff F2F meeting, members were asked to send any of their recommendations to Azzaro and Bolin by Friday, August 18, 2017.

### **Approval of July Minutes**

Joan Ogden made a motion to approve the July minutes Angel Azzaro seconded the motion. The committee approved.

### **Program Owners Report**

Tamikio Bohler had nothing to report.

### **Activity Report**

Alice Azzaro reported that there was an error in calculating outreach hours this month, when it is resolves she will email the report to the committee members.

Azzaro reminded the committee to turn in their August outreach activity reports.

Azzaro attended the Outreach Committee call and recommendations from that call are:

- To use TAP Facebook page, members are asked if they are Facebook users to check it out and sue it to share the TAP vision.



- Members are reminded to review the TAP Newsletter to stay on top of what all committees are working on this will assist them when participating in outreach events.
- Members are asked to take photos during their outreach event that can then be shared in TAP Newsletter articles.

### **Subcommittee 1 – Report Out**

Issue 35872 – Accounts Management (AM) Assistors – Alice Azzaro reported this issue is complete and is currently in review. When back from review any recommendations will be considered/added then it will go to the JC for consideration.

New Issues for subcommittee 1 is researching information on to see if these should be worked in the future:

- Calling Internal Revenue Service (IRS) for Individual Taxpayer Identification Number (ITIN)
- “Where’s My Refund?” – Taxpayer’s are calling the IRS number but no one is answering the call. Tamikio Bohler asked that when communicating with the taxpayer who made this comment that if we know the dates and time of the call we IRS can actually track the call and assist in addressing the issue.

### **Subcommittee 2 – Report Out**

Issue 36206 – Area Codes: Angel Hower reported that this has been forwarded to the JC.

New Projects:

- Filing Information Returns Electronically System (FIRE): the system is locking people out and they are required to have a password to continue  
Subcommittee 2 will look into the issue.
- Issue 36247 – Taxpayers’ contacting IRS have reported that taxpayers are having been having problems with their all just circling and not receiving the desired final destination.

### **Screening Subcommittee Report Out**

The members met this month, cleaned up, and classified the items on the screening report list. They establish a monthly call for the first Thursday of every month at 10:30 a.m. ET. These calls are open to all members.

### **Roundtable for Members**

No comments.

### **Toll Free Action Item(s) Summary**

- Smith thanked everyone for all their hard work to keep the issues moving forward.



- Two referrals are going forward to JC.
- Subcommittee two has a call today.
- Rosalind Matherne is detailed into TAP and will be assisting the committee with day to day activities and if members need assistance, they can call her.

**DFO – Official Closing of the Meeting**

Cedric Jeans thanked everyone for their participation today and closed the call.

**The next Toll Free Committee call will be on September 20, 2017.**

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 19, 2017**

**TAP Staff**

- Sheila Andrews, TAP Director
- Javier Hernandez, TAP – Acting TAP Director
- Cedric Jeans, Designated Federal Official (DFO)
- Susan Jimerson, Chief, TAP West
- Fred N. Smith, Jr., TAP Committee Lead Analyst
- BJ Burleigh, Secretary – TAP Secretary

**IRS Staff**

- Tamikio Bohler, W&I Operation Support
- Debra Awalt, W&I Program Coordination & Support

**TAP Members**

- Alice Azzaro, Wellington, FL – Acting Committee Vice Chair
- Angel Hower, Norwalk, IA
- Daniel Persons, Brooklyn, NY
- Harold (Hal) Manasa, Henderson, NC
- Jimit Shah, Bethpage, NY
- Joan Ogden, Salt Lake City, UT
- Kimberly Pierre, Spring, TX
- Richard “Kent” Christensen, Boise, ID – National Chair
- Sean McPhilamy, Talkeetna, AK
- Timothy “Tim” Bolin, Cheyenne, WY – Committee Chair
- Zanobia Oliver, Box Elder, SD

**Absent Members**

- Kathy Davis, Albuquerque, NM

**Public**

There were no public members on the call.

**Roll Call**

BJ Burleigh conducted roll for the meeting. Quorum is met.

**Opening**

Cedric Jeans opened the meeting and welcomed everyone to the call.

**National Office Report**





Javier Hernandez shared that he and TAP management are currently meeting in Indianapolis, Indiana, to discuss the future of TAP. He shared that the Joint Committee (JC) will have a face-to-face meeting in Memphis, Tennessee, Aug. 22-23, 2017, to discuss areas of TAP that may need improving for FY 2018. He thanked all who helped in the recruitment process it is now completed. Credentialing, fingerprinting and background checks of the recruits are now underway. Hernandez also thanked the members for all of their outreach efforts, networking, teamwork, and overall exposure to the public.

### **National Office Report/Designated Federal Official Report**

Cedric Jeans shared that the TAP Virtual Flyer is now on TAPSpace, [www.TAPSpace.org](http://www.TAPSpace.org). He asked that the members use this reference when with their TAP social media outreach. Jeans asked that those that use Facebook to sign onto TAP Facebook and use this to share the TAP message.

Jeans shared that the JC will have a face-to-face meeting in August. He asked the members to send any topic ideas that the committee can bring forward to him, Timothy Bolin and Fred Smith.

The 2017 Tax Forums have begun; TAP will be represented at each forum. Jeans encouraged the members that if a forum is near their location that they try to attend.

### **Welcome/Announcements/Comments/Acknowledgement of Citizens**

Timothy Bolin welcomed everyone to the meeting and thanked the subcommittees for working so hard. Bolin confirmed that there were no citizens on the call.

Bolin announced a change to the committee vice chair assignment. Kathy Davis is unable to continue on as vice chair, Alice Azzaro has agreed to take on those duties with the committee's approval. Angel Hower made a motion to approve Alice as vice chair, Sean McPhilamy seconded and the committee approved.

### **Approval of June Minutes**

Joan Ogden made a motion to approve the June minutes Hal Manasa seconded the motion. The committee approved.

### **Program Owners Report**

Tamikio Bohler had no report at this time.

### **Activity Report**

Alice Azzaro reported to date the committee has reported 979.2 participation hours; 72 hours for outreach; eight outreach events; and a total audience of more than 100,000. Daniel Persons has had many successful outreach events and volunteered to assist the committee members if they have any questions or concerns with their events. Azzaro reminded the committee to turn in their July outreach activity reports.



Azzaro attended the Orlando Tax Forum, where she was able to talk with many members of the public and hear their stories.

### **Subcommittee 1 – Report Out**

Issue 35872 – Accounts Management (AM) Assistors – Alice Azzaro reported research on creating a no reply email with a links for the taxpayers to navigate to the desired departments.

### **Subcommittee 2 – Report Out**

Issue 36206 – Area Codes: Angel Hower reported that the referral is ready to move forward to the JC. The subcommittee is ready for a new project.

### **Screening Committee Report Out**

Issue 36247 – Contacting IRS: Zanolvia Oliver reported that taxpayers have been having problems with their all just circling and not receiving the desired final destination.

FIRE System – Filing Information Returns Electronically System: the system is locking people out and they are required to have a password to continue. Subcommittee 2 will look into the issue.

### **Roundtable for Members**

Joan Ogden shared that the training video on audits was very interesting. There are 10 lessons to watch but they do not need to be completed all at once.

Tim Bolin encouraged the committee members to read the TAP Newsletter to stay current with all that TAP is doing. Sean McPhilamy said that he uses the newsletter during his outreach events.

### **Toll Free Action Item(s) Summary**

### **DFO – Official Closing of the Meeting**

Cedric Jeans thanked everyone for their participation today and officially ended the call.

**The next Toll-Free Phone Line Committee call will be on Aug. 16, 2017.**

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 20, 2017**

**TAP Staff**

- Cedric Jeans, Designated Federal Official (DFO)
- Sheila Andrews
- Fred N. Smith, Jr., TAP – Committee Lead Analyst
- Javier Hernandez, TAP – Acting TAP Director
- Kevin Brown, Secretary – TAP Secretary

**IRS Staff**

- Tamikio Bohler, W&I Operation Support
- Debra Awalt, W&I

**TAP Members**

- Alice Azzaro, Wellington, FL
- Angel Hower, Norwalk, IA
- Daniel Persons, Brooklyn, NY
- Jimit Shah, Bethpage, NY
- Joan Ogden, Salt Lake City, UT
- Sean McPhilamy, Talkeetna, AK
- Timothy Bolin, Cheyenne, WY – Committee Chair
- Zanobia Oliver, Box Elder, SD
- Richard “Kent” Christensen, Boise, ID – National Chair

**Absent Members**

- Kathy Davis, Albuquerque, MN – Committee Vice-Chair
- Harold (Hal) Manasa, Henderson, NC
- Kimberly Pierre, Spring, TX

**Public**

Alan Petrazzi

**Roll Call**

Quorum is met.

**Opening**

Cedric Jeans opened the meeting and welcomed everyone to the call.

**National Office Report**

Hernandez reported that the recruitment process is almost over. We are starting the credentialing, fingerprinting and background part of this process. Hernandez thanked all who have helped in this process. Hernandez also thanked the members for all of



their outreach efforts. Hernandez is proud of the networking, teamwork and overall exposure this is give TAP to represent the public.

### **Chief – TAP East Report**

Jeans reported that the National Taxpayer Advocate (NTA) has resumed her blogging and you can subscribe to this as well. Please refer to [www.tapSPACE.org](http://www.tapSPACE.org) to ensure we are getting the right issues. Look at the changes on [www.irs.gov](http://www.irs.gov) as it will be helpful to this process. Jeans suggested subscribing to e-news to receive news releases from [www.irs.gov](http://www.irs.gov) to stay aware of changes that the IRS is making.

### **Welcome/Announcements – Chair Report**

Timothy Bolin welcomed the committee members and thanked them for working with him as he missed some meetings. Bolin mentioned folks stopping by his booth learning more about TAP as he is attending a safety conference for the energy industry. Recommending newsletter to see what other committees are doing. Bolin suggested members look at the TAP newsletter to be aware of what other committees are doing.

### **Acknowledgement of Public Citizens**

Alan Petrazzi, interested in helping with TAP mission.

### **Approval of May minutes**

McPhilamy motioned, Hower seconded. Minutes approved as submitted.

### **Program Owners Report**

Tamikio Bohler had no report at this time. Bohler did recommend the committee continue to utilize any resources needed including Subject Matter Experts (SME)s for the completion of recommendations.

### **Activity Report**

Jeans reported 43 participation hours; 2.3 hours of outreach; 4 outreach events; and a total audience 16. We received reports from 75 of the members.

### **Sub-Committee 1 – Report Out**

Alice Azzaro reported research on creating a no reply email with education to send to taxpayers. Job description for Customer Service Representatives (CSR)s and ARs to be reviewed by committee, Zenobia Oliver spoke on hold times. Kimberly Pierre will do more research about this.

Action item and specific recommendations:

- Identify taxpayers who are comfortable using self-help options.
- Add specific language identifying self-help and no self-help taxpayers.
- Adding YouTube videos to this process.
- Hold messages that give self-help education.
- A draft will be available before the July meeting.

### **Sub-Committee 2 – Final Referral**

Angel Hower reported a referral is ready for Quality Review (QR). The subcommittee is currently reviewing any possible new issues with Fred Smith to find new projects. The subcommittee is also reviewing any other lines that may need to be changed. The Affordable Care Act (ACA) phone lines were discussed, no decision has been made yet.

The IRS indicated that there would be some of the business rule changes which will be discussed during the next meeting. Jeans reported that traffic for 1040 phone lines for month of June was sent out to be reviewed as a possible project. The committee requested from Wage and Investment (W&I) the top five toll free lines with heaviest phone traffic, and is awaiting a response now.

### **Screening Sub Committee Report out**

Fred Smith reported some items were associated with previous items and others with completed subjects. ACA still in parking lot; The next meeting will be to review any new issues that need to be screened.

### **Toll Free Action Item(s) Summary**

McPhilamy, would we like to document screening committee's information on TAPspace website as a file folder to include comments and ending decisions? Ogden thinks this is a good idea to allow detailed research on issues such as this to allow us to be well informed and allowing full access to the committee. Jeans has folder already created as 2017 Toll free Screening Committee Report is the folder.

### **Roundtable for Members**

Bolin recommended new member coming in next year given the point we are in this year. Christensen reported that the TAP is being recognized by practitioners as making an impact. Ogden reports that stakeholder calls are a wonderful source for issues from practitioners. Bolin says committee meetings can be changed and added as needed. Davis is not able to participate based on scheduling and an Acting Vice Chair was requested. Emails should be sent to Bolin for consideration. Andrews corrected the process as looking for a designee not an Acting Vice Chair.

### **Toll Free Action Item(s) Summary**

- Subcommittee 1 working on a rough draft for completing recommendation.
- Hower sent recommendation to go through QR and Legal Advisor.
- Screen committee to determine next projects.
- Summarize Screening added to a new folder on TAPspace to be reviewed by the committee.



### **DFO – Official Closing of the Meeting**

Anyone interested in attending the JC meeting should speak to Bolin to get the invite. Hernandez explained the process of bringing in a new TAP member now or next year. Jeans thanked the members for joining the call and officially closed the meeting.

**The next Toll Free Committee call will be on July 19, 2017.**

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 22, 2017**

**TAP Staff**

- Cedric Jeans, Designated Federal Official (DFO)
- Fred N. Smith, Jr., TAP Committee Lead Analyst
- Javier Hernandez, TAP – Acting TAP Director
- BJ Burleigh, Secretary – TAP Secretary

**IRS Staff**

- Tamikio Bohler, W&I Operation Support
- Debra Awalt, W&I Program Analyst
- Rosemary Rixey, W&I Program Coordination & Support

**TAP Members**

- Alice Azzaro, Wellington, FL
- Angel Hower, Norwalk, IA
- Daniel Persons, Brooklyn, NY
- Kimberly Pierre, Spring, TX
- Timothy Bolin, Cheyenne, WY – Committee Chair
- Zanobia Oliver, Box Elder, SD

**Absent Members**

- Harold (Hal) Manasa, Henderson, NC
- Jimit Shah, Bethpage, NY
- Kathy Davis, Albuquerque, NM – Committee Vice-Chair
- Joan Ogden, Salt Lake City, UT
- Sean McPhilamy, Talkeetna, AK

**Roll Call**

BJ Burleigh conducted roll for the meeting a quorum is met.

**Opening**

Cedric Jeans, DFO, declared the meeting open and welcomed all.

**National Office Report**

Javier Hernandez mentioned a solicitation has gone out to all committee members requesting that they volunteer at minimum of one hour of their time to assist with interviews of potential TAP members. Please send an email with the hours you are available to Fred and to the TAP mailbox at [taxpayeradvocacypanel@irs.gov](mailto:taxpayeradvocacypanel@irs.gov).



### **TAP DFO Report**

Jeans shared information regarding an upcoming focus group session regarding the IRS FY 2018 Strategic Budget Planning that will involve the chairs and vice chairs of each committee. Jeans explained that some questions will be provided in advance, and he encouraged members to share their concerns with the committee chairs to consider during the focus group session. The focus group session will be held in June 2017.

### **Welcome/Announcements – Chair Report**

Timothy Bolin welcomed the committee members and thanked them for allowing this call time to be rescheduled to today.

### **Acknowledgement of Public Citizens**

No members of the public were in attendance today.

### **Program Owners Report**

Tamikio Bohler, W&I Operation Support, had nothing to report.

### **April Minutes Approval**

The April minutes are approved upon one amendment being made.

### **Activity Report**

Kathy Davis was absent today.

- Jeans, DFO, reported that TAP is working on a workbook that will consolidate all members' activity report, same as last year. Jeans went on to explain the new version had some technical difficulties, which was the reason they reverted back to the method used last year.
- For next month, Jeans asked the committee to bring outreach stories to share during the call.
- The Outreach Committee has a final draft of the Virtual Outreach Initiative flyer, which will be disseminated to all TAP members and explain how best to share TAP information using social media.
  - There are *canned* messages to cut and past when you are posting to social media.
  - You can use social media to ask probing questions to assist in getting public feedback regarding current projects and new grassroots issues.
- Bolin reminded the members to send their activity reports to the TAP mailbox at [Taxpayeradvocacypanel@IRS.gov](mailto:Taxpayeradvocacypanel@IRS.gov) and cc Smith every month.

### **Subcommittee 1 – Report Out**

Alice Azzaro reported that the referral on redirecting callers to IRS online resources was still in the development stages. The subcommittee reviewed the TAS Annual Report, along with the previous submitted referral regarding Public Service Announcement, to help support the referral development. Some of the actions the subcommittee is considering:





- They are working to determine the target audience;
- Toll-Free messages and prompts; and
- Taxpayer comprehension and the need for new prompts.

They plan to have an official proposal to share next month.

### **Subcommittee 2 – Final Referral**

Angel Hower reported that the referral to remove the Area Code restrictions is in final stages and is being reviewed for quality. They plan to have it ready for full committee vote next month.

### **Screening Subcommittee Reports**

Zanobia Oliver reported the screening subcommittee met last week and only had one member attend, as other had technical difficulties calling in. The subcommittee will scheduled another call within the next few weeks. Bolin mentioned the inventory report has 10 new issues and the screening committee will need to meet soon to determine if new issues are worthy of advancing to a project status.

### **Roundtable for Members**

Members did not have any roundtable topics for discussion.

### **Toll Free Action Item(s) Summary**

- Send Activity Reports by May 25, 2017.
- If anyone needs assistance setting up call to host ad-hoc meetings please contact Fred Smith or Timothy Bolin for assistance.

### **DFO – Official Closing of the Meeting**

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

**The next Toll-Free Phone Line Project Committee call will be on June 21, 2017.**

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 19, 2017**

**TAP Staff**

- Cedric Jeans – Designated Federal Official (DFO)
- Fred N. Smith, Jr. – TAP Committee Lead Analyst
- Sheila Andrews, Director – TAP Director (Absent)
- Javier Hernandez – TAP – Absent
- BJ Burleigh, Secretary – TAP Secretary

**IRS Staff**

- Tamikio Bohler, W&I Operation Support (Absent)
- Johnnie Beale, W&I Operation Support
- Debra Awalt, W&I Program Analyst
- Rosemarie Rixey, Customer Account Services (CAS) Policy Analyst

**TAP Members**

- Alice Azzaro, Wellington, FL
- Timothy Bolin, Cheyenne, WY – Committee Chair
- Kathy Davis, Albuquerque, NM – Committee Vice-Chair
- Angel Hower, Norwalk, IA
- Ashley Hunter, Austin, TX (Absent)
- Harold (Hal) Manasa, Henderson, NC
- Sean McPhilamy, Talkeetna, AK
- Joan Ogden, Salt Lake City, UT (Absent)
- Zanobia Oliver, Box Elder, SD
- Daniel Persons, Brooklyn, NY
- Kimberly Pierre, Spring, TX
- Jimit Shah, Bethpage, NY
- Richard “Kent” Christensen, TAP Chair, Boise, ID

**Opening**

Cedric Jeans the DFO declared the meeting open and welcomed all.

**Roll Call**

BJ Burleigh conducted roll for the meeting and quorum is met. Burleigh is detailed into TAP as the TAP East secretary, her contact info is cell phone (303) 603-4632, office phone (303) 603-4632, fax (855) 813-7411, email: [BJ.Burleigh@irs.gov](mailto:BJ.Burleigh@irs.gov).

**Welcome/Announcements**



Timothy Bolin opened the meeting. It was determined that there were no public attendees.

### **National Office Report, (NOR)**

DFO Cedric Jeans reminded the committee that TAP is currently in recruitment for new members until April 24, 2017. Applicants can apply through [www.usajobs.gov](http://www.usajobs.gov). TAP continues to looking for members from Alaska, North, and South Dakota.

TAP will continue to hold information sharing calls with Internal Revenue Service (IRS) divisions to help TAP members learn of the numerous processes used to help taxpayers.

Invitation: to all TAP members to attend the all TAP meetings to go over the upcoming program changes.

Reminder: Please take a moment to complete the Survey for the Face to Face (F2F) meeting will be closing on April 25, 2017.

TAP Newsletter: will contain information on all works in progress by the TAP committees that members can share at outreach events.

### **Approval of the Minutes**

The minutes for F2F meeting are approved for posting to [www.improveirs.org](http://www.improveirs.org) after a few grammatical changes are corrected.

### **Subcommittee One**

Project 35872 – Online Navigation – Alice Azzaro reported that will be getting together next week to work on the project and will report out next meeting.

### **Subcommittee Two**

Project 35873 – 1040 Script – Angel Hower reported that at the F2F meeting three options were discussed

- ◆ Removal of the restrictions that move taxpayers to specific office groups just by area code but by issue.
- ◆ Develop an application to house an issue proposal form to have the committee address taxpayer issues.
- ◆ Research the IRS referral form to create a more detail driven form.

### **Screening Committee Report**

Fred Smith shared an Excel spreadsheet to show the database of previous year's projects to show and the final decisions per-project. On the database:

- ◆ How the committee receives the project to work
  - By phone call from taxpayers
  - Through IRS Automated Collection System (ACS)
  - From any of the TAP committees



### **Outreach/Activity Report**

The committee members are to turn in their outreach activity reports by COB April 25, 2017.

Cedric Jeans discussed the Form 1040 script, he asked the committee members to ask the public at their outreach events to review the script and share comments.

### **Action Item Summary**

Items to be completed by next meeting:

- ◆ Make the requested changes to the minutes.
- ◆ Post the minutes to TAPSpace.
- ◆ Fred Smith will send out new invitations to the future committee meetings.
- ◆ Subcommittee 1 will complete their proposal.
- ◆ Committee members will send in their activity reports.
- ◆ TAP announcement completions.
- ◆ Contact BJ Burleigh if members have any travel issues for the F2F meeting.

### **Closing Comments**

Timothy Bolin thanked everyone for joining the call.

### **Closing**

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

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



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 20, 2017**

**TAP Staff**

- Sheila Andrews, Designated Federal Official (DFO) – Director TAP
- Kim Stewart, Executive Director Case Advocacy
- Antoinette Ross, Program Analyst – TAP
- Fred Smith, Program Analyst – TAP

**Toll-Free Committee Members**

- Timothy “Tim” Bolin – Cheyenne, WY
- Alice Azzaro – Wellington, FL
- Angel Hower – Norwalk, IA
- Sean McPhilamy – Talkeetna, AK
- Jimit Shah – Bethpage, NY
- Harold Manasa – Hendersonville, NC
- Joan Ogden – Salt Lake City, UT
- Zanobia Oliver – Box Elder, SD
- Daniel Persons – Brooklyn, NY
- Kathy Davis – Albuquerque, NM – Via Conference Call
- Kimberly Pierre – Spring, TX – Via Conference Call

**Absent**

- Ashley Hunter – Austin, TX

Meeting opened up by DFO Sheila Andrews at 1:08 p.m.

**Welcome/Announcements**

Sheila Andrews, TAP Director, opened the meeting and introduced the TAP team. Fred Smith conducted an ice breaker.

**Roll Call**

Quorum was met for this meeting. The minutes for November were approved by the full committee for posting to [www.improveirs.org](http://www.improveirs.org).

**Meeting**

Smith went over the TAP Mission, explaining the roles and responsibilities of being a TAP chairperson and TAP member.

**Nominations and elections are held:**

- **Chair Nominations** – Timothy Bolin (accepts and is elected)



- **Vice Chair Nominations** – Kathy Davis (accepts and is elected)

**Established sub-committees:**

**Full Committee Meetings: Third Wednesday, 2:30 – 3:30 p.m. EST**

**Subcommittee 1 – Meetings: Noon – 1 p.m. EST**

Public Service Announcement (PSA) and Accounts Management (AM)  
Assistors): Tim Bolin; Alice Azzaro; Jimit Shah; Zanolbia Oliver; Kimberly Pierre;  
Kathy Davis

**Subcommittee 2 – Meetings: 1 – 2 p.m. EST**

Affordable Care Act (ACA): Joan Ogden; Daniel Persons; Angel Hower; Harold  
Manasa; Sean McPhilamy; Ashley Hunter

**Screening Committee: meeting time TBD**

Sean McPhilamy; Alice Azzaro; Zanolbia Oliver

**Quality Review: meeting time TBD**

Joan Ogden and Jimit Shah

**Internal: meeting time TBD**

Angel Hower; Jimit Shah; Kimberly Pierre

**Outreach: meeting time TBD**

Kathy Davis

The minutes for November were approved by the full committee for posting to [www.improveirs.org](http://www.improveirs.org). There was discussion on the committee's previously elevated issues.

Meeting adjourned by DFO – Sheila Andrews at 4:17 p.m.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 21, 2017**

**TAP Staff**

- Sheila Andrews, Designated Federal Official (DFO) – Director TAP
- Kim Stewart, Executive Director Case Advocacy
- Antoinette Ross, Program Analyst – TAP
- Fred Smith, Program Analyst – TAP

**Toll-Free Committee Members**

- Timothy “Tim” Bolin – Cheyenne, WY
- Alice Azzaro – Wellington, FL
- Angel Hower – Norwalk, IA
- Sean McPhilamy – Talkeetna, AK
- Jimit Shah – Bethpage, NY
- Harold Manasa – Hendersonville, NC
- Joan Ogden – Salt Lake City, UT
- Zanobia Oliver – Box Elder, SD
- Daniel Persons – Brooklyn, NY
- Kathy Davis – Albuquerque, NM – Via Conference Call
- Kimberly Pierre – Spring, TX – Via Conference Call

**Absent**

- Ashley Hunter – Austin, TX

Meeting opened up at 8:45 a.m. by DFO Sheila Andrews.

**Roll Call**

Quorum was met for this meeting.

**Welcome/Announcements**

Sheila Andrews, TAP Director, opened the meeting and introduced the TAP team. Fred Smith conducted an ice breaker.

**Meeting**

Fred Smith explains how to screen an issue and the screening committee is formed.

**Project Committee Presentation by Wage & Investment (IRS)**

IRS Staff:

- Debra Awalt, Wage and Investment (W&I), Customer Acct Services (CAS)
- Elizabeth Ortiz, W&I Accounts Management (AM)
- Veronica Wheeler, W&I Operation Support (OS)



- Tamikio Bohler, W&I Operation Support (OS)
- Daniel Horan, W&I Service Centers, Brookhaven Accts Management
- Johnnie Beale, W&I Operation Support (OS)

**TAP members ask questions to presenters:**

Q: Do you have any percentage number of callers?

A: No – Don't know if they access the web; IRS is in the process of revamping the www.irs.gov.

Q: Does the toll free line direct people to the tools?

A: A lot of them will point them to www.irs.gov.

Q: Can a copy of the script be provided To the TAP members?

A: Debra Awalt will request that information and give it to the analyst Smith

Q: Does the IRS app communicate with the Integrated Internal Security Protection System or does that make the taxpayer responsible for security on his/her mobile devise?

A: Awalt will find that information. Slowly they are building the application. The next application offering depends on what they are looking for.

Committee goals and items to confirm:

- Committee wants to make sure they have all the available options.
- Develop further script to give them information on these options.
- Let them know it is more beneficial and less wait time.
- Trying to find the best method and provide customer service with those who cannot sure the internet.
- Alternate option if they do not have to wait on the line.
- Call the 1040 number (Test the site).
- Check on the refund.
- Order a transcript.
- W&I has completed extensive testing on a wide variety of taxpayers.

March 16, 2016

Access individual tax information:

- Balance Due (every 24 hours)
- Payment history (up to 18 months)
- View Balance (Make not of your account number)
- Online Payment Agreement
- \*Only US based phones can be used for verification process to use online system cannot be done with a land line

IPPIN – Identify Protection PIN:

Q: Should warning be provided to those who have an IPPIN?

A: Notices are sent out to ID theft victims.

If you do not have financial obligations, you cannot use the only line system.





What needs to be looked at is:

How can we get toll free assistors the knowledge on how the systems work?

Will the customer service rep (CSR) have access to view your account and payment system online?

Can a link be sent to taxpayer (maybe the committee can address that issue)?

Q. Can payday loans be used as payment verification?

A. No to payday loan verification (Per Debra Awalt-Authentication Group can come to one of the subcommittee meeting.

### **SubCommittee Breakout sessions**

Members worked in their perspective subcommittee on projects assigned. Each subcommittee lead reported on projects worked and status going forward.

### **Wrap up** – Tim Bolin, Chair

Thanked everyone for having confidence in him to lead the committee. We had some real magic moments during these few days. A nearly completed process referral and communications.

- A mixed bag of issues and quickly learned about screening and cleaned that up some.
- Achieved a much better start with the TAP staff.

### **Going forward** – Tim Bolin, Chair

- Congratulate ourselves on screening.
- Two subcommittees are balanced with expertise and fresh eyes.

### **Staff Closing**

Fred Smith thanked everyone for attending and provided closing comments

Sheila Andrews thanked everyone for attending and gave closing comments. Officially adjourned the meeting 4:42 p.m.

**Next Full Committee Meeting: April 19, 2017 at 2:30 noon ET**

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