



2019 Meeting Minutes Toll-Free Phone Line Project Committee

- March 21-22, 2019
 - April 10, 2019
 - May 8, 2019
 - June 12, 2019
 - July 10, 2019
 - Aug. 14, 2019
 - Sept. 11, 2019
 - Oct. 9, 2019
 - Nov. 13, 2019
-

Toll-Free Phone Line Project Committee Taxpayer Advocacy Panel (TAP) Face-to-Face Meeting Minutes March 21, 2019

TAP Staff Present

- Cedric Jeans, Designated Federal Official (DFO) –TAP
- Rosalind Matherne, Toll-Free Committee Analyst
- Fred N. Smith, Jr., Special Projects Committee Analyst

TAP Members Present

- Phillip Kleiber
- Terrill Flakes
- Alyssa Burrows
- Bernard Peterson
- Lacy Rice
- Alice Azzaro
- Cynthia Pinkney
- Zanobia Oliver
- Kathy Hauer (phone)

Welcome/Announcements/Review Agenda

DFO, Cedric Jeans greeted the participants and officially opened the meeting.

Self-Introductions/Roll Call

The attending TAP members introduced themselves and provided background.

TAP Mission



Jeans goes over the TAP mission. He provided examples of outreach the members can do to achieve the mission. Cedric goes over the TAP vision. He talks about the TAP Charter and how the Commissioner provides resources to the program that enables it to achieve its mission. He talks about the Annual report and how the Commissioner and other organizations read the report and how the program tries to drive people to read the annual report. Speaks about TAS and the NTA and the NTA Annual Report to Congress (ARC) and the areas the resources ARC covers. Matherne informs the committee she will send them copies of the ARC.

Jeans goes over the program responsibilities and how the program works grassroots issues and projects from the IRS and TAS. Jeans covers TAP issues and the program screens issues and drops issues. Jeans talks about the issues should focus on IRS customer service improvements.

TAP Meeting Procedures

Matherne covers the ground rules of TAP meetings. Informs the members of the methods of communication the TAP program uses to conduct meetings (conference calls, WEBEX, email).

So You Want to Be A Chair?

Power point presentation given for the benefit of the members.

Nominations

Phillip Kleiber was nominated by Alice Azzaro for the position of Committee Chair. He accepted the nomination.

Zanobia Oliver was nominated by Bernard Peterson for the position of Committee Chair. She declined the nomination.

Bernard Peterson was nominated by Lacy Rice for the position of Committee Chair. He declined the nomination.

Cynthia Pinkney was nominated by Zanobia Oliver for the position of Committee Vice Chair. She accepted the nomination.

Alyssa Burrows was nominated by Bernard Peterson for the position of Committee Vice Chair. She declined the nomination.

The committee declared the acceptance of the single nomination for both positions as a unanimous vote for the 2019 Chair and Vice-Chair.

Election Results

Kleiber wins the Toll-free 2019 Chair nomination and Pinkney wins the Vice-Chair nomination. Kleiber gives his vision for Toll-Free for the 2019 TAP year.

Establish Quorum & Consensus



Jeans goes over quorum is and what it means. He gives the equation that for 10 members quorum would be 50% plus 1. For the Toll-free committee meeting quorum would be 6. Consensus is a majority, but the Chair has tie-breaking authority.

Approval of November 2018 Minutes

The members took 5 minutes to review the minutes. Kleiber moved to accept the minutes with edits (TAP Vice Chair should read Patrick Kusiak). 2nd by Bernard Peterson. Motion passes.

Establishment of Sub Committees and Meeting Date and Times

Full committee meeting - 2nd Wednesday of the month at 12 p.m. ET

Subcommittee 1 - 1st Wednesday of the month at 11 a.m. ET

Subcommittee 2 – 1st Wednesday of the month at 1 p.m. ET

Quality Review - Bernard Peterson and Kathy Hauer (as needed)

Internal Communications – Lacy Rice and Alice Azzaro (information to come)

Outreach – Cynthia Pinkney (information to come)

Screening Committee – Alyssa Burrows, Terrill Flakes and Zanobia Oliver (as needed)

Screening Committee Overview

Matherne goes over the process of screening an issue and what an issue is.

Jeans adds information on systemic issues and issues that have been raised by the NTA. Matherne speaks about the Parking lot status assigned to certain issues.

IRS Project Committee Work Liaison (Deborah Awalt)

Deborah Awalt gave an overview on W&I and its goal and mission. Largest operation division. Awalt presented the possibility of working on a pilot project.

Jeans closes the meeting at 4:34 p.m. MT.



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Face-to-Face Meeting Minutes
March 22, 2019**

TAP Staff Present

- Cedric Jeans, Designated Federal Official (DFO) –TAP
- Rosalind Matherne, Toll-Free Committee Analyst
- Fred N. Smith, Jr., Special Projects Committee Analyst

TAP Members Present

- Phillip Kleiber
- Terrill Flakes
- Alyssa Burrows
- Bernard Peterson
- Lacy Rice
- Cynthia Pinkney
- Zanobia Oliver

TAP Members Absent

- Alice Azarro
- Kathy Hauer

Members of the Public

- Paul Merrion

Welcome/Announcements/Review Agenda

Jeans welcomes the TAP members and officially open the meeting. Jeans gives an overview of the committee's project work from yesterday.

Jeans releases the members to break into their subcommittees to work on their current projects.

SubCommittee Work Con't

Subcommittee 1 Report Out

- Issue # 40705 -- Toll-Free Phone Lines Customer feedback
- Issue # 40704 -- Voice Messaging Option

Subcommittee 2 Report Out

- Issue # 40707 -- High Cost for International Taxpayer to Call IRS
- Issue # 40706 -- Publishing of More IRS Toll-Free Numbers



Meeting Assessment / Travel / Next Steps / Closing

Jeans summarizes the meeting and address any concerns the members might have. Jeans informs members to contact Matherne for all committee needs.

Jeans closes the meeting at 11:53 a.m. MT.

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 10, 2019**

IRS Staff Present

- Debra Awalt – W&I Program Coordinator
- Rose A. Babb – Management Assistant
- Terri English – TAP Director
- Rosalind Matherne – TAP Analyst
- Fred Smith – Acting Designated Federal Official, DFO

IRS Staff Absent

- Tamikio Bohler
- Cedric Jeans – Designated Federal Official, DFO
- Gary Linsey

TAP Members Present

- Terrill Flakes, Atlanta, GA
- Kathryn Hauer, Aiken, SC
- Philip Kleiber, Roswell, GA
- Zanolbia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Cynthia Pinkney, Tyler, TX
- Lacy Rice, Jr, Radcliff, KY

TAP Members Absent

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA

Members of the Public

N/A

Opening

Smith was the Designated Federal Official for Jeans who was absent. He welcomed all and declared the meeting open.

Approval of Minutes

The members voted to approve the March minutes from the face to face meeting. The minutes will be posted to www.improveirs.org.

Welcome/Announcements

Kleiber, Chair and Pinkney is the Vice Chair of the Toll-Free Committee for 2019. The both welcomed everyone and proceeded with the agenda.



National Office Report/ DFO Report

English welcomed everyone and stated the following:

- The recruitment season is currently open to the public from April 8, 2019 through May 3, 2019. Members and staff are asked to use their talking points during outreach in areas of low applicant turn out responses.
- Record keeping cards with a check sheet will be sent to members from the TAP mail box.
- The Joint Committee's first teleconference is scheduled for April 25, 2019, 1:00 - 2:30 p.m. ET. The Joint committee is a combination of the chair and vice chairs of the full committees. New members are encouraged to join the call according to their schedules to see how the process works.
- Tax Forms and Publications will have its annual forum in 5 cities. Volunteers are asked to consider attending if they are in proximity of those locations; an email will be sent soon with the details. Members can be approved for 2 days attendance at the forum.

DFO Report

Smith stated the following:

- Members are reminded that to remain a panel member, they must continue to meet their tax obligation timely each year.
- Members will be receiving a Face to Face Meeting survey this week; this survey responses will help to improve the TAP program.
- If you haven't submitted your travel voucher for processing; please do so.

Outreach Activity/Update

The Outreach Committee will have their first meeting on Wednesday, April 17 @3:00 p.m. ET.

Kleiber mentioned that Atlanta Congress woman Lucy McBath came to visit the Volunteer Income Assistance site, VITA site and met with the VITA site workers. They discussed TAP and the referrals that are currently being worked on.

Rice stated that he spoke about TAP to his Alumina Association; he is working on connecting with the LTA of his home state.

Oliver mentioned that she is working on outreach on improveirs.org.



Awalt mentioned that possible reasons that tax refunds are down are that some taxpayers received the EITC benefit. She mentioned that TAP can refer taxpayers to online W4 calculator, this can enable taxpayers to calculate the amount of refund they may expect to receive.

Subcommittee 1

The subcommittee is continuing to research and work the following issues:

Issue# **40705** - *Toll Free Phone Lines Customer Feedback*

Issue# **40704** - *Voice Messaging Option*

Subcommittee 2

The subcommittee is continuing to research and work the following issues:

Issue# **40707**- *High Cost for International Taxpayer to Call IRS*

Issue# **40706** – *Publishing of More IRS Toll-Free Numbers*

Action Items

- Remember to join the Joint Committee meeting on April 25 @1:00 - 2:30 p.m. ET.
- Regarding issue 40706 a request for a subject matter expert will be requested to join the next Subcommittee 2 call on May 1

Kleiber thanked the members for joining the call and Smith declared the meeting closed.

**The next full committee teleconference call will be on Wednesday,
May 8, 2019 at 12:00 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
May 8, 2019**

IRS Staff Present

- Rose A. Babb – Management Assistant
- Tamiko Bohler - Management and Program Analyst, W&I
- Cedric Jeans – Designated Federal Official, DFO
- Rosalind Matherne – TAP Analyst
- Fred Smith – TAP Analyst
- Paula Johnson – TIGTA

IRS Staff Absent

- Debra Awalt – W&I Program Coordinator
- Terri English – TAP Director

TAP Members Present

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA
- Terrill Flakes, Atlanta, GA
- Kathryn Hauer, Aiken, SC
- Philip Kleiber, Roswell, GA
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Cynthia Pinkney, Tyler, TX
- Lacy Rice, Jr, Radcliff, KY

Members of the Public

- Mark Ryan - GAO

Opening

Jeans welcomed all and then declared the meeting open. Quorum was met for this meeting.

Approval of Minutes

The members voted to approve the April minutes for posting to www.improveirs.org.

Welcome/Announcements

Kleiber welcomed everyone and proceeded with the agenda.

National Office Report/ DFO Report

English was absent, and Jeans covered both reports:



- Analyst Billups shared a document on TAP Space on TAS assistance offered for Problem Solving Days; members are asked to look at that email, it provides the dates and cities for the event.
- Thanks to the members for the first quarterly meeting; if members have any topics that they believe will be beneficial to the TAP membership, they are encouraged to inform the TAP Staff.
- The TAP business cards order has been received; the TAP staff will send them out to those members that were waiting for cards.
- The recruitment period from has ended on May 3 for new TAP membership. For those members who can assist in conducting interviews, they should contact the analyst of their committee with their schedule of availability.
- Tax Forums will be held in 5 cities. Volunteers are asked to consider attending if they are in proximity of those locations; Fred Smith will send an email to those members.

Outreach Activity/Update

Pinkney stated that there was a 100% submission of outreach events for the month of April. The committee is working on identifying annual reoccurring outreach events to create a repository list. An email will be sent to the full committee to request information to create and update the repository sheet. This repository sheet will enable new members each year to build and develop their own outreach events. A list of Local Taxpayer Advocates will be emailed today to the full committee.

Subcommittee 1

Peterson reported out on the following:

This subcommittee is continuing to work Issue #40704 – *Voice Messaging Option* and, #40705 – *Toll Free Phone Lines Customer feedback*. Matherne, the Analyst for this committee will assist the committee with their research efforts.

Subcommittee 2

Oliver reported out on the following issues:

Issue #40706 – *Publishing of more IRS Toll Free numbers*- The full committee voted to move forward with this issue to the Joint Committee for consideration to send to the IRS.

Issue #40707 – *High Cost for international taxpayers to call IRS* -This issue is still being worked on; the subcommittee is still working on gathering information to continue to work the issue.

Action Items

- Issue 40124, this issue has been partially accepted by the IRS and is under consideration for adoption for 10/1/2020; the members have decided to discuss a rebuttal on the portion of the issue that was not adopted by the IRS at the next subcommittee Meeting later this month.



- Members are reminded that as part of the Federal Advisory Act –when sending emails to members on TAP matters, such as outreach, they must include a copy “cc” the TAP email box.
- Activity Reports are due the 25th day of each month.

Public Comments

There were no comments from the public.

Closing

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

**The next full committee teleconference call will be on
Wednesday, June 12, 2019 at 12:00 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
June 12, 2019**

TAP Members Present

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA
- Kathryn Hauer, Aiken, SC
- Philip “Phil” Kleiber, Roswell, GA
- Zanolbia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Cynthia Pinkney, Tyler, TX
- Lacy Rice, Jr, Radcliff, KY

TAP Members Absent

- Terrill Flakes, Atlanta, GA

IRS Staff Present

- Kevin Brown – Management Assistant
- Tamikio Bohler - Management and Program Analyst, W&I
- Cedric Jeans – Designated Federal Official (DFO)
- Rosalind Matherne – TAP Analyst
- Paula Johnson – Treasury Inspector General for Tax Administration (TIGTA)

IRS Staff Absent

- Debra Awalt – W&I Program Coordinator
- Terrie English – TAP Director

Opening/Roll Call

Jeans welcomed all and then declared the meeting open. Quorum was met for this meeting.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Phil Kleiber spoke getting presentations from Subject Matter Experts (SME) and thanked everyone for the committee work. Kleiber and Flakes to New Orleans and Azzaro to Chicago to work the tax forums. Kleiber wanted to clarify how to capture issues while doing outreach:

- Completing Form 14388
- Send taxpayer to www.improveirs.org
- Have taxpayer send you an issue with the issue
- Put in activity report under the designate “working issue”



National Office Report/DFO Report

English reminded members that the farewell meeting with the National Taxpayer Advocate (NTA) was still scheduled. English reported that Interviews are in progress. The Joint Committee meeting is on June 27, 2019 to move issue to IRS. Jeri Hunter, Notices and Correspondence Chair, will be stepping down since she was selected as LTA for Alaska.

Jeans posted the 2020 budget justification and annual report to www.tapspace.org. In the report, they mention there is 10.5 million budgeted for the callback technology which might be of interest to this committee since this is for all toll-free services. Please review when you get a chance. Jeans sent that email today.

Approval of Minutes

The members voted to approve the May 2019 minutes for posting to www.improveirs.org as submitted. Peterson motioned, Burrows seconded.

Outreach Activity/Update

Pinkney:

- Keep track of your activity, which is what is used to possibly qualify you for a presidential award.
- The challenge for July is to complete Form 14388 and submit when talking to taxpayer. Pinkney will email the committee about this after the meeting.
- Last challenge was to reach out to LTAs. Howard and Rice were able to complete this. Pinkney encouraged everyone else to do this and keep up with the outreach.

Rice shared outreach event Hooray for Heroes: Annual event tried to get booth for the LTA was not able to do so. Rice distributed TAP information to various groups that attending this community fair. There were not very many questions, but some groups did request for Rice to come speak to their organizations individually. Pickney reminder members to include any annual events that can be used on the database.

Jeans reminded those attending the tax forums that Rose Babb and Fred Smith will be working with them on these events.

Kleiber reported and event with the Stakeholder Liaison. Through the Communications, Stakeholder Liaison & Online Services (CSO) Georgia society of CPAs, Kleiber got to speak at this event. They had not heard from TAP before which was a good experience. This may be included in our outreach database.

Subcommittee 1

- Issue #40705 -- *Toll-Free Phone Lines Customer feedback*



Bernard Peterson spoke of option for caller to do a customer satisfaction survey after a call to allow taxpayers who want to be heard can be heard. We are being stymied to find out how Treasury gets this information for such surveys. It is currently a work in progress with Rice and Peterson as the leads.

Awalt said a SME from that department will be attending committee calls very soon. They will be able to say what they do with this information. We may need someone from Statistics to join the call also according to Awalt.

- Issue #40704 -- *Voice Messaging Option*
Leave a message issue is being researched instead of requesting a call back.
- Issue #40558 -- *Amend Interactive Voice Response (IVR) Scripts to include a public service announcement for taxpayers to rate the IRS Customer Service Representatives after calls.*

This is related to how we solicit or invite taxpayers to leave issues on to your website www.improveirs.org. Can we invite callers on hold to submit issues to the site, asked Peterson? Awalt said there are only five Public Service Announcements (PSAs) that can be on a line. As for who chooses them Awalt said it depends on the time of the year. The last idea is how to improve data coming in by the sending the survey results to TAP to be screened for recommendations.

Subcommittee 2

Oliver said the callback technology and international taxpayers calling toll free lines, issue 40707, was discussed. We have enough to start the referral and speak more about this during next month's meeting. There was an issue regarding how to find out the status of submitting Form 2848 by taxpayer representatives as maybe an online option. This is issue 41100, which is still being worked.

- Issue #40706 -- *Publishing of More IRS Toll-Free Numbers*
Matherne Issue 40706 sent to IRS on June 4, 2019, they have 60 days to respond.

Chair and Vice Chair of TFPL Committee Closing Comments

Screening meeting will take place in late June according to Kleiber. We are looking for volunteers for the monthly submission for the newsletter, Kleiber solicited. Kleiber will write a schedule for this task through the rest of the year and send it to the committee starting with July. This will be a recap the committee's work for the month and explain what is going on. Kathryn Hauer will do the one for June.

Azzaro reported the Internal Communications committee is working on social media guidelines so TAP can develop for all social media accounts such as Facebook, LinkedIn and Twitter. Jeans reminded the committee that TAP is independent from TAS and IRS social media accounts. In respect to TAP social media accounts, the



Outreach committee and the Internal Communications committees are the leads and we should reach out to them for this, according to Matherne.

Action Items

- There will be two SMEs for the Subcommittee 1 July 3, 2019 meeting about the Statistical data on surveys
- PSA research
- Communicate with Alice for PSA
- Subcommittee 2 meeting on June 20, 2019
- Screen Meeting on June 26, 2019
- Kleiber will send schedule for Newsletter articles
- Hauer is writing the first article for the Newsletter

Closing

Jeans thanked everyone for attending the call and closed the meeting.

**The next full committee teleconference call will be on
Wednesday, July 10, 2019 at 12:00 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
July 10, 2019**

TAP Members Present

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA
- Terrill Flakes, Atlanta, GA
- Kathryn Hauer, Aiken, SC
- Philip Kleiber, Roswell, GA
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Cynthia Pinkney, Tyler, TX
- Lacy Rice, Jr, Radcliff, KY
- Laura Snyder, Paris, France

IRS Staff Present

- Debra Awalt – W&I Program Coordinator
- Rose A. Babb – Management Assistant
- Tamiko Bohler – Management and Program Analyst, W&I
- Cedric Jeans – Designated Federal Official, DFO
- Rosalind Matherne – TAP Analyst
- Fred Smith – TAP Analyst

IRS Staff Absent

- Terri English – TAP Director

Opening

Jeans welcomed all and then declared the meeting open. Quorum was met for this meeting.

Approval of Minutes

The members voted to approve the June minutes for posting to www.improveirs.org.

Welcome/Announcements

Kleiber welcomed everyone and proceeded with the agenda.

National Office Report/ DFO Report

Jeans reported for English who was not present. He stated the following:

- The managers and analysts will be in Albuquerque, NM the week of July 22; if members want to contact them directly, there may be a delay in returning emails and or phone calls.



- The TAP management is working to schedule a teleconference with the NTA. Nina Olson before she retires later this month.
- The recruitment season is over; the selections were made and were submitted to be finalized. TAP expects to receive approval for their selections in the next few months.
- The National Tax Forum held this week in Washington, DC was attended by both Robert Moretti and Steven Selden. Moretti has communicated to Jeans that both he and Steven received several issues from the attendees at the forum.
- The Joint Committee will meet in Arizona the week of August 12 for their annual face to face meeting. TAP members are asked to submit suggestions for topics/suggestions for the next TAP year 2020. These suggestions should be sent to Rosalia, Jeans and Stratton.
- A link for the Taxpayer First Act email was sent out today; it was also posted on TAP Space as well for members to review; there are lots of information that TAP members may find useful for their projects.

Outreach Activity/Update

Pinkney mentioned that outreach doing well and that members should continue meeting the monthly deadline on the 25th day of each month to submit Monthly Activity Report.

Hauer mentioned that she attended a congressional Liaison meeting; she mentioned that LTA, Mary Good invited her to the event. Hauer stated that she connected well with the Taxpayers and did a presentation on the TAP.

Kleiber mentioned a good source of information during outreach events is the TAP Newsletter -for talking points. He also noted that Jeans will research if there are any internal issues that may prevent the Newsletter from being used as a good outreach tool. Kleiber also mentioned the TAP Annual Report – may have some statistics on referrals accepted, considerations and, call back technology- that can be used during outreach.

Subcommittee 1

Peterson reported out on the following:

Issue# **40705** *Toll Free Phone Lines Customer feedback*. This issue is being reviewed by SA/AA and will be sent to the JC if there are no further revisions to be made by the committee.

Issue **#41110** *Taxpayer Survey Report*. This subcommittee is working this issue.

Issue **#40558** *Amend IVR Scripts to include a public service announcement for Taxpayers to rate IRS CSRs after calls*. This issue will be worked as a project by the subcommittee



Subcommittee 2

Oliver reported out on the following issues:

Issue #40707 – *High Cost for international taxpayers to call IRS* -This issue is being reviewed by SA/AA and then will be sent to the JC if there are no more revisions.

Issue #41100 – Add Prompt to practitioner’s line for POA. This issue is still being worked; Awalt stated that she will contact an SME to attend the August meeting to have a discussion on this issue.

Action Items

- Members are reminded that as part of the Federal Advisory Act –when sending emails to members on TAP matters, such as outreach, they must include a copy “cc” the TAP email box.
- Activity Reports are due the 25th day of each month.

Public Comments

There were no comments from the public.

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

**The next full committee teleconference call will be on Wednesday,
August 14, 2019 at 12:00 p.m. ET.
1-888-331-8226 Access Code 1122046**

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 14, 2019**

TAP Members Present

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA
- Terrill Flakes, Atlanta, GA
- Kathryn Hauer, Aiken, SC
- Philip “Phil” Kleiber, Roswell, GA
- Zanobia Oliver, Box Elder, SD
- Cynthia Pinkney, Tyler, TX
- Lacy Rice, Jr, Radcliff, KY

TAP Members Absent

- Bernard Peterson, Cazenovia, NY

IRS Staff Present

- Debra Awalt – W&I Program Coordinator
- Kevin Brown – Management Assistant
- Terrie English – TAP Director (Absent)
- Cedric Jeans – Designated Federal Official (DFO)
- Paula Johnson – Treasury Inspector General for Tax Administration (TIGTA)
- Robert Rosalia - Program Analyst

IRS Staff Absent

- Tamikio Bohler - Management and Program Analyst, W&I

Opening/Roll Call

Jeans welcomed all and then declared the meeting open. Quorum was met for this meeting.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Phil Kleiber welcomed everyone on the meeting.

National Office Report/DFO Report

Jeans reminded the committee to work the issues and stay in touch with Rosalind Matherne to finish the year strong. Jeans thanked the members who helped with the interviews and reported the recruitment package nearing the end of this process. Jeans encouraged members to share any future issues that the committee could consider for next year. Bridget T. Roberts is the new Acting National Taxpayer Advocate (ANTA). Maryclaire Ramsey previewed the taxpayer roadmap which



details a taxpayer's experience through the IRS pipeline. This will be officially released to the public in about two weeks. It is Publication 5341 and a copy will be sent to each member very soon.

Approval of July Minutes

The July minutes approved as submitted. Azzaro motioned, Burrows seconded.

Outreach Activity/Update

Pinkney reminded everyone to send their outreach reports since she is missing one person's report. We reached over 300,000 taxpayers. Facebook was used as a primary method of outreach. Kleiber shared his experience at the New Orleans tax forum. Kleiber explained the location was not the best, but they were still able to explain the mission and recruit potential TAP members. Kleiber indicated that we have a branding issues being confused with TAS too much.

Flakes spoke of a positive experience from tax representator sharing the struggles of many of their tax payers. Flakes echoed the branding confusion with TAS. Azzaro spoke of a difference from the Atlanta and Chicago tax forums. Azzaro reported that we may have six potential future TAP members and receiving several possible issues. We listened to the individual issues due to the possibility that they might turn into systemic issues.

Subcommittee 1

40558 Public Service Announcements on IRS- Changed the wording and will move forward with this issue. There is still additional work to be done on this.

41110 Taxpayer Survey Data Reports- We are looking for a copy of those surveys to try and improve or resolve these issues. The information has been requested and we are awaiting a response according to Jeans. This will be for all of TAP. Awalt indicated that no referral is needed for a data request.

Subcommittee 2

Oliver reported working issue 41110 with a Subject Matter Expert (SME). We are not able to get a direct line to confirm receipt of Form 2848. Errors go to the taxpayer and not to the practitioner, which can be a focus for this referral. The idea was adding a reminder for the practitioner to check with your client if they believe there is a notice or problem with this process. Awalt confirmed that because this is establishing a third-party representative, it needed to go to and from the taxpayer until the Power of Attorney has been established for security reasons. There will be a record of this recommendation for record keeping. Awalt confirmed that third-party access is something that is being worked on in the future.

40707 has received a response from the IRS and will be reviewed by the committee shortly. Research will be done before our response is made since many taxpayers prefer to do business by phone instead of online.



Roundtable

Kleiber spoke about Roberts was kind and favorable about TAP and its accomplishments. She credited TAP for shining a light on the Taxpayer Bill of Rights (TBOR). Ramsey will personally help with our international referral. We will vote for the next National Chair and Vice Chair for next year. There will be an informational call on September 19, 2019, to help members through this process. Burrows is accepting any input regarding social medial with the Internal Communications committee (ICC).

Chair and Vice Chair of TFPL Committee Closing Comments

Screening meeting will take place in late June according to Kleiber. We are looking for volunteers for the monthly submission for the newsletter, Kleiber solicited. Kleiber will write a schedule for this task through the rest of the year and send it to the committee starting with July. This will be a recap the committee's work for the month and explain what is going on. Kathryn Hauer will do the one for June.

Azzaro reported the Internal Communications committee is working on social media guidelines so TAP can develop for all social media accounts such as Facebook, LinkedIn and Twitter. Jeans reminded the committee that TAP is independent from TAS and IRS social media accounts. In respect to TAP social media accounts, the Outreach committee and the Internal Communications committees are the leads and we should reach out to them for this, according to Matherne.

Action Items:

- July minutes approved
- 40558 Made changes to wording and is currently being worked
- 41110 Awaiting survey results
- 41100 Working
- 40706 Working on rebuttal.

Closing

Jeans thanked everyone for attending the call and closed the meeting.

**The next full committee teleconference call will be on Wednesday,
September 11, 2019 at 12:00 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
September 11, 2019**

Members Present

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA
- Terrill Flakes, Atlanta, GA
- Philip “Phil” Kleiber, Roswell, GA
- Zanobia Oliver, Box Elder, SD
- Bernard “Bernie” Peterson, Cazenovia, NY
- Lacy Rice, Jr, Radcliff, KY

Members Absent

- Kathryn Hauer, Aiken, SC
- Cynthia Pinkney, Tyler, TX

IRS Staff Present

- Debra Awalt – W&I Program Coordinator
- Kevin Brown – Management Assistant
- Cedric Jeans – Designated Federal Official (DFO)
- Paula Johnson – Treasury Inspector General for Tax Administration (TIGTA)
- Rosalind Matherne - Program Analyst

IRS Staff Absent

- Tamikio Bohler - Management and Program Analyst, W&I
- Terrie English – TAP Director

Opening/Roll Call

Jeans welcomed all and then opened the meeting. Quorum was met.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Kleiber thanked everyone for joining the call and focused on the national day of remembrance that September 11, 2001 has become. Kleiber encouraged members to attend the September 19, 2019 Chair and Vice Chair meetings to become part of TAP leadership for next year. There are only two meetings left before the year ends so we need to finalize our efforts by November.

National Office Report/DFO Report

English welcomed everyone to the call and shared the IRS Commissioner’s words on this day for our nation. Appreciate what the committee does. Recruitment package is being processed. Currently the background checks are being done. Be sure you are completing your activity reports. Turn the report in, even if it is not



complete at this point. English wants to recognize the members what will soon be retiring from the panel. All members are encouraged to send their pictures in. Jeans reported we are revising some of our training products and encouraged members to help with our upcoming training sessions for the next year.

Approval of August Minutes

The August minutes approved as submitted. Rice motioned, Peterson seconded.

Outreach Activity/Update

Kleiber reported 1329 TAP hours, 437 outreach hours with 600 events. Kleiber reminded members to get the activity reported completed and turned in so we can account for the activity before the TAP year ends. Kleiber spoke of an outreach event with his Local Taxpayer Advocate (LTA). Jeans commended the committee for the large audience they reached this year.

Subcommittee 1

Petersen shared an experience on September 11, 2001 where people were lost during that tragic event.

- Issue # 40558 – Public Service Announcements on IRS Toll-Free Phone Lines. Peterson motioned, Flakes seconded.
Action: Issue elevated to Joint Committee, pending Quality Review (QR).
- Issue # 41110 – Taxpayer Survey Data Reports -- The subcommittee is still working on this issue.

Howard Brooks was the Subject Matter Expert (SME). We can probably get this information without a referral. Matherne will get the response to us very soon.

- *40705- For customers to be able to opt in to a survey. We expect a response by next month on this pending referral.*
- Issue #41465 – Expand TAP Awareness on IRS/TAS survey questions and websites.

Subcommittee 2

- Issue # 41100 – Add an Announcement to the Practitioner’s Line for POAs. This issue should be ready for next month’s meeting.
- Referral # 40706 - Working on Reconsideration- Adding Additional “800” Numbers on the www.IRS.gov website.

We are currently working on a rebuttal to this response. Our response should be ready by next month. Awalt explained that the rejection was made to avoid taxpayers just calling different published numbers to get to a live person. This often results in extremely long hold times and taxpayers getting to the wrong department. Therefore, the IRS designed the telephone menu to properly route the calls. Jeans and English recommended sending this back to the subcommittee to further review it in detail before sending a rebuttal.

Roundtable



Kleiber spoke about the Screening committee and noticed an uptick connects to IRS forms. A lot of the responses was about the practitioner line as well. Many complaints were a result of callers receiving different answers depending on which Customer Service Representative (CSR) they spoke with. This issue is still being worked. Rice spoke of complications with an event being canceled because a new LTA came on board. English encouraged all members to keep their analysts involved in these issues. English and Matherne will follow-up on this issue soon.

Chair and Vice Chair of TFPL Committee Closing Comments

Action Items:

- August minutes approved
- Issue 40558 elevated to JC
- Subcommittee 2 working rebuttal for 40706
- Subcommittee 1 Still working on 41100
- Still working 41465
- Working with Rice on outreach issue with new LTA

Closing

Jeans thanked everyone for attending the call and closed the meeting.

**The next full committee teleconference call will be on Wednesday,
October 9, 2019 at 12:00 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
October 9, 2019**

Members Present

- Alyssa Burrows, Kingston, PA
- Terrill Flakes, Atlanta, GA
- Philip “Phil” Kleiber, Roswell, GA
- Zanobia Oliver, Box Elder, SD
- Bernard “Bernie” Peterson, Cazenovia, NY
- Cynthia Pinkney, Tyler, TX
- Lacy Rice, Jr, Radcliff, KY

Members Absent

- Alice Azzaro, Wellington, FL
- Kathryn Hauer, Aiken, SC

IRS Staff Present

- Debra Awalt – W&I Program Coordinator
- Kevin Brown – Management Assistant
- Terrie English – TAP Director
- Paula Johnson – Treasury Inspector General for Tax Administration (TIGTA)
- Cynthia “Cindy” Jones - Manager W&I
- Rosalind Matherne - Program Analyst
- Fred Smith – Designated Federal Official (DFO)

IRS Staff Absent

- Tamikio Bohler - Management and Program Analyst, W&I

Opening/Roll Call

Smith welcomed all and then opened the meeting. Quorum was met.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Kleiber announced he is running for TAP Chair and Pinkney is running for TAP Vice-Chair. There will be a “Meet the Candidates” call on October 17, 2019, at 2:00pm ET. Voting will be open from October 17, 2019 to October 25, 2019, with the results being announce on November 1, 2019. Kleiber thanked everyone for how hard they have worked over these last 30 days and this has been a great year so far. Pinkney thanked everyone for all they have done and reminded the committee to complete the activity reports in chronological order.

National Office Report/DFO Report



English reminded the committee attend the “Meet the Candidates” session to get to know the candidates before voting. English emphasized how important properly completing the activity reports out and how they affect possible awards for retiring members. English also encouraged member to continue doing outreach as usual unless there is a work stoppage within the federal government.

Fred Smith is coordinating the retirement project and alerted everyone that he will be sending requesting information from members as needed. This information will allow us to determine who is eligible for what awards and allow us to recognize the members for all their work for TAP. The ceremony will be November 22, 2019, the time has not been set yet.

Approval of September Minutes

Burrows motioned Petersen seconded. Approved as submitted.

Outreach Activity/Update

Pinkney reported over 175 outreach hours with over 11,000 taxpayers reached for August. In September we had over 35 outreach hours reaching over 4600 taxpayers. Pinkney encouraged continued strong number through the end of this year.

Subcommittee 1

- Issue #40705-- Caller Option to participate in a customer satisfaction survey- Response Received – Under Consideration 12/31/21

They think it is a good idea and it remains under consideration as things change and will remain there for at least a year. We will take no further action at this time but can check on this next year.

- Issue # 40558 – Public Service Announcements on IRS Toll-Free Phone Lines. We are still awaiting a response.
- Issue # 41110 – Taxpayer Survey Data Reports -- The Subcommittee is still working on this issue. Research Attached

Petersen reported during our research it was determined that we can just make a formal request for the information without needing an issue. We received six Spreadsheets full of information that we are currently reviewing. So far, we have found there were some recurring themes which may be made into issues. Some of them pertain to our committee, while other probably should go to other committees. Petersen said this is something that may be good to do at least once a year.

Awalt explained how the Power of Attorney process works and what can explain how or why there may be delays in establishing this using Form 2648. In addition, the screening committee process was discussed to understand how issues are sent to the appropriate TAP committee. Kleiber suggested using this to find issues for next year for this and maybe the other TAP committees.



Subcommittee 2

- Issue # 41100 – Add an Announcement to the Practitioner’s Line for POAs
Issue is ready to be elevated to the Joint Committee (JC).

Rice motioned, Hauer seconded. Issue elevated the JC.

- Issue # 40706 - Adding Additional “800” Numbers on the IRS.gov website
Working on Reconsideration- (Tabled for now)

Not sure what to do with this one yet.

- Issue # 40707 -- Lower Cost and Improve Access for International
Taxpayers. Working on Reconsideration

This is still being worked and will likely be ready for next month. We will have a Subject Matter Expert (SME) for this issue. Matherne thanked Awalt for her assistance on this matter. Kleiber highlighted how helpful it can be if we worked with other committee members on issues that may be better served since, we have experts on many different subjects throughout the TAP. The committee would like for TAP to consider setting up a committee to allow this sort of collaboration more often.

Roundtable

Kleiber said there will be another screening committee call before Thanksgiving this year. Rice inquired if the “Meet to Candidates” session would be recorded or is there a way to access more information about the candidates. The candidate’s statements will be on www.tapspace.org, according to English. Rice made the recommendation to record these statements in video format before the elections in the future for members to have access. English is working with Burrows on LTA outreach event at this moment. Jones thanked the committee for doing a phenomenal job and looks forward to working with the committee in the future. English informed the committee that TAS has been working to have the National Taxpayer Advocate (NTAs) engage with TAP members and the Acting NTA has committed to seeing this done.

Action Items:

- 40705 Sub 1 continue work
- 41100- Sent to screening committee
- Screening committee meeting setup
- 41100 elevated to JC
- 40706 under reconsideration, remains in Parking Lot now
- 40707 Being researched, will get SMEs

Closing

Smith thanked everyone for attending the call and closed the meeting.

**The next full committee teleconference call will be on Wednesday,
November 13, 2019 at 12:00 p.m. ET.**



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



**Toll-Free Phone Line Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 13, 2019**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer (DFO)

Members Present

- Alyssa Burrows Kingston, PA Member
- Terrill Flakes Atlanta, GA Member
- Kathryn Hauer Aiken, SC Member
- Philip “Phil” Kleiber Roswell, GA Member
- Zanolbia Oliver Box Elder, SD Member
- Bernard Peterson Cazenovia, NY Member
- Cynthia Pinkney Tyler, TX Member
- Lacy Rice, Jr. Radcliff, KY Member
- Laura Snyder Paris, France Member (Special Projects)

Members Absent

- Alice Azzaro Wellington, FL Member

IRS Staff

- Debra Awalt – W&I Program Coordinator
- Tamikio Bohler – Management and Program Analyst, W&I (Absent)
- Kevin Brown – Management Assistant
- Terrie English – TAP Director
- Paula Johnson – Treasury Inspector General for Tax Administration (TIGTA)
- Cynthia “Cindy” Jones – Manager W&I
- Rosalind Matherne – Program Analyst
- Fred Smith – Designated Federal Official (DFO)

Members of the Public

N/A

Roll Call

A quorum was met for this meeting.

Opening/Welcome – Cedric Jeans

Jeans welcomed all and then opened the meeting.

Welcome/Announcements/Comments/Acknowledgement of Citizens



Kleiber welcomed everyone to the call and reminded the members they have until Friday, November 15, 2019, to select the committee they want to serve on next year. The face to face next year is expected to be held earlier pending the possibility of a government shutdown. More will be provided. There will be solicitations for presenters for the face to face meetings by email very soon, please consider doing this. There will also be a solicitation for mentors for new members next year, according to Kleiber. Kleiber applauded the committee for making quorum for the entire year.

Pinkney thanked everyone who turned in their activity reports. Pinkney offered assistance to anyone who needs assistance with this and reminded the committee there was one more report that needs to be submitted.

National Office Report/DFO Report

Jeans thanked everyone for a wonderful year and mentioned the committee did a lot of wonderful work.

- The retirement ceremony will be on November 22, 2019, at 11:00am ET.
- The presidential awards have been requested for eligible members.
- The end of the year survey will be sent out soon.
- Working on locations for the face to face meetings.
- Recruitment process will start earlier for next year.
- Consider soliciting for new members during your outreach events.

Approval of September Minutes

Burrows motioned Petersen seconded. Minutes approved as submitted.

Outreach Activity/Update

Pinkney thanked Burrows for embodying the spirit of TAP with her outreach each month. Pinkney congratulated and thanked Azzaro and Oliver for their service. Pinkney will send a reminder for the last activity report very soon.

Subcommittee 1

Peterson thanked and congratulated Azzaro, Oliver and Burrows before they retire.

- Issue # 40558 – Public Service Announcements on IRS Toll-Free Phone Lines
 - Awalt indicated the response should be ready around December 1, 2019.
- Issue # 41110 – Taxpayer Survey Data Reports
 - Peterson indicated this could be done on a regular basis by the committee. The results can be sent to the screening committee.
- Issue #41674 – Customer Callback (CCB) Script



- Referral changed to include language saying [you will receive a call back in a specified amount of time from either area code (XXX), (304) or from US government.] Rice motioned, Pinkney seconded.

Action: Elevated to the Joint Committee (JC) as amended

Subcommittee 2

- Issue # 40707 - Lower Cost and Improve Access for International Taxpayers
 - Oliver reported working with a Subject Matter Expert (SME) on this issue. This issue was a 2015 Most Serious Problems (MSPs). This issue will be continued for next TAP year. The Taxpayer First act will be implemented in the year 2020. Kleiber added, the IRS is setting up an office to establish this and what needs to be done to work on this. Oliver has enjoyed working on TAP.

Roundtable

Kleiber reported that during the last JC meeting, the message we recommended for the practitioner line was confirmed as being implemented before the JC approved the referral. Kleiber thanked Awalt and Bohler, and the TAP staff for their assistance with the committee. Kleiber thanked all the retiring members for what they have done for TAP.

Action Item Summary:

- 41674 Elevated to JC
- 41110 continue to work for next year
- 40558 waiting a response from IRS
- 40707 continue to work for next year
- Thanked Snyder for working with the committee on this issue
- Congratulations to Kleiber for being the new National Chair
- Jeans thanked the IRS staff, the leadership and the members for all they did this year and announced working on a TAP alumni club.

Closing

Jeans thanked everyone for attending the call and closed the meeting.

The next full committee call TBD

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