



**Toll Free Phone Lines Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, November 12, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- | | | |
|-----------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph “Joe” Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Michael Odom | Wage & Investment |
| • Dale Hawkins | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. Terrie English TAP Director was not able to attend the call. Overview of the Agenda was shared and the following upcoming meetings:

- This is the final meeting for TAP year 2020. Appreciation was expressed to the committee for their hard work and commitment shown
- Retiring members Phil Kleiber and Bernard Peterson were acknowledged and congratulated on a job well done. Members were encouraged to attend the retirement ceremony to be held on November 20, 2020 beginning at 11:00 am, EDT
- Members were informed Terrie English sent her appreciations and thank you to the retiring members and the members of TFPL
- The mentorship program will meet on November 13, 2020 at 12:00 pm, EDT

- Internal Communications Committee (ICC) last meeting of the year is scheduled for November 17, 2020 beginning at 3:00 pm, EDT
- The Outreach Committee meeting is scheduled for November 19, 2020 beginning at 12:00 pm, EDT
- Joint Committee final meeting for the TAP year will be held on November 19, 2020 beginning at 1:30 pm, EDT and lead by Phil Kleiber
- The end of the year survey for members will be available soon. Members were encouraged to participate with comments

Chair Report

Andrea Price welcomed members to the last meeting of the TAP year 2020. She thanked each member of the committee for their leadership, dedication and hard work for the year.

- The Joint Committee had their meeting on October 22, 2020. TFPL had two referrals that were both approved by the Joint Committee
- Tax Forms and Publications submitted one referral for approval
- TAC had one referral for approval
- Special Projects had four referrals submitted
- Reminder shared IRS is backlogged with mail. Taxes paid by mail may not be opened. The electronic option is still available for Taxpayers to submit payments

Minutes Approval

Joe Edelen motioned and Phillip Kleiber seconded approval of October 14, 2020 Minutes.

Public Comments

None

Screening Report

Price stated the Screening committee dropped all the issues.

Lacy Rice motioned and Joe Edelen seconded to accept the Screening Report as submitted

Decision: Full Committee Consensus approve Screening Report as submitted

Subcommittees Report

Subcommittee 1

Bernard Peterson expressed gratitude for being a part of TFPL and thank you to Rosalind Matherne for her assistance. Subcommittee 1 discussed the following issue:

- **Issue #43221, IRS telephone numbers should be listed in the 1040 Instructions** Subcommittee 1 completed the referral. They recommend this issue be forwarded to the Joint Committee for approval. Matherne

added the approval from the Attorney Advisor was received and anticipate Systemic Advocacy would not have any objections.

Peterson motioned and Edelen second to move Issue #43221 to the Joint Committee

Decision: Full Committee Consensus forward Issue #43221 to the Joint Committee for consideration

Subcommittee 2

Cynthia Pinkney expressed appreciation working with all the committee members and thanked everyone for doing a great job. Subcommittee 2 discussed referrals in the Parking Lot.

Outreach

Rice stated the Outreach Committee met and discussed issues for the upcoming year.

- Returning members were reminded their Outreach hours will continue and continue to record Outreach hours to be carried over to the next TAP year
- Rice complimented everyone for a job well done doing Outreach
- Peterson and Kleiber were thanked for invaluable assistance
- Members were encouraged to continue doing a great job
- The current Activity reports are at one hundred percent
- Reports are due on the 25th of each month
- Corrections to the report should be done as soon as possible
- Members were encouraged to utilize social media to do Outreach to get the word out about TAP. Matherne expressed appreciation to Rice for his dedication and hard work

Internal Communications Committee (ICC)

Edelen stated ICC discussed six items. Three were covered by Laurie on the November Newsletter.

- During the October 27, 2020 meeting, they discussed Zoom meetings approved for next year by IRS. Jimerson added there are a limited number of licenses. At this point, there are not enough for each committee. Information will be shared as it becomes available
- The November Newsletter has been published and December is pending
- TAP Facebook administrator was discussed during that meeting. Laurie Brock volunteered to be one of the administrators. The second person has yet to be determined
- The new member check list was discussed and will be determined by another committee

Roundtable

- Edelen spoke on how appreciative he was with the welcome he received at the beginning of the TAP year. Matherne has been very helpful. Jimerson is always available and helpful.
- Donna Burris shared her appreciation for commitment shown to volunteers. The attendance and dedication have been impressive.
- Kleiber recognized Peterson and members for leadership roles
- Peterson stated the value of the Face to Face meeting is so valuable. He stated his appreciation for working on the committee
- Pinkney expressed her appreciation

Action Items

Rosalind Matherne thanked members on the call for a job well done and she stated that she looked forward to working with members next year. The following Action items will be done:

- Post October 14, 2020 approved Minutes onto www.TAPSpace.org
- Drop the issues from the Screening Report

Members were thanked for the good work being done and a reminder to members to attend the graduation ceremony next week.

Close

Matherne officially closed the meeting for Jimerson.

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



**Toll Free Phone Lines Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, October 14, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- | | | |
|-----------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph “Joe” Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Michael Odom | Wage & Investment |
| • Debby Awalt | Wage & Investment |
| • Dale Hawkins | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. TAP Director, Terrie English was not able to attend the call. The following upcoming meetings were shared:

- The Outreach Committee meeting is scheduled for October 15, 2020 beginning at 12:00 pm, EDT. This committee is led by the TAP Vice Chair, Robert Moretti and attended by the Vice Chairs of the Project Committees
- The first draft of the Chair Report for the Annual Report is due to be turned in to Gilbert Martinez on October 16, 2020. Martinez is the Joint Committee Analyst and the analyst in charge of the 2020 Annual Report
- There will be an informational session explaining what it is like to be a TAP Chair or Vice Chair scheduled for October 20, 2020 at 3:00 pm, EDT

- Following the format of events for the upcoming TAP Chair and Vice Chair Election process, nomination or self-nominations are due on October 25, 2020 by 12:00 am, EDT. Members were encouraged to submit their interest by midnight on October 25, 2020
- Campaign statements are due October 30, 2020 by midnight and will be posted onto www.TAPSpace.org by November 02, 2020
- There will be a meet the candidates session held on November 05, 2020 at 3:00 pm, EDT and voting ballots will be sent to members by November 06, 2020.
- Votes are due to be turned in on November 13, 2020 by midnight. Results will be shared on November 17, 2020
- There will be a mentorship program on October 21, 2020 at 3:00 pm, EDT. Calendar invites have been sent to members that have expressed interest
- Joint Committee monthly meeting will be held on October 22, 2020 beginning at 1:30 pm, EDT. TAP Chairs and Vice Chairs, Chairs from each project committee and Internal Communications committee will attend this meeting. Members were encouraged to join in on the call
- Internal Communications Committee (ICC) meeting is scheduled for October 27, 2020 beginning at 3:00 pm, EDT.

IRS has added a QR Code on www.IRS.gov website to assist Taxpayers when looking for options on paying balances owed and Installment Agreements. Currently the QR Code is being used on the CP14 and CP14A notices. The Online 2021 Tax Forums information is available for viewing.

Jimerson shared a review of the Agenda for today's meeting.

Chair Report

Andrea Price welcomed everyone to the call. There is one meeting remaining for the Toll-Free Phone Lines (TFPL) Committee in this TAP year. Thank you was expressed to Bernard Peterson and Cynthia Pinkney for submitting the Subcommittee work for the 2020 year. Price stated:

- The Joint Committee had their meeting on September 24, 2020
- Five Committees had referrals for approval submitted to the Joint Committee: TFP submitted one, NCC submitted three, TCC had three referrals; one relating to Where Is My Refund, Simplify IRS calendar due date for different entities and the third was to supply Taxpayers with the ability to get a written payoff by year and Tax forum
- TFPL had two referrals, both of which were approved by the Joint Committee
- Special Projects Committee submitted one referral for approval

Minutes Approval

September 8, 2020 TFPL Minutes were approved as submitted.
Joe Edelen motioned and Phillip Kleiber second approval of September 8, 2020 minutes. Edelen requested his name be addressed as “Joe”.

Public Comments

None

Screening Report

Price stated on the September 21, 2020 Screening Report there were three items. Two of the items were dropped and the third item was being worked by Peterson and his Subcommittee relating to the Toll-Free Phone Line language in English and Spanish.

Edelen motioned and Peterson second to accept the Screening Report from September 21, 2020

Decision: Full Committee Consensus approve Screening Report

Issue #40124, Taxpayer’s Contact Information if Disconnected from Customer Service Representative The recommendation submitted was to have the customer service representative ask Taxpayers permission for a call back number if disconnected. IRS issued a response rejecting the recommendation. It was updated on September 29, 2020 showing IRS response.

Debra Awalt explained the difference in the call-back queue that holds the callers place in line and disconnect calls options. Staffing is not adequate to handle the volume of callbacks.

Jimerson informed the Committee, when IRS issues a response and they are not adopting the recommendation, the Committee has the option to submit a rebuttal. When completing a rebuttal, new facts would need to be added that were not previously included in the rebuttal before resubmitting it back to the IRS. It does not mean the IRS will change their decision. It does mean that would be the end of the process for that specific referral.

Kleiber made the motioned and Edelen second to drop Issue #40124

Decision: Full Committee Consensus accept IRS response and drop Issue #40124

Subcommittees Report

Subcommittee 1

Bernard Peterson stated Subcommittee 1 met twice this month. They have been working two Issues:

- **Issue #43221, IRS telephone numbers should be listed in the 1040 Instructions** Subcommittee 1 is working to complete the referral and anticipates having it ready for the Full Committee review during next month’s meeting

- **Issue #43632, Reposition Foreign Language Prompts on 1040 Toll Free Line** Subcommittee 1 recommendation is to forward this Issue to the Joint Committee for consideration

Peterson motioned and Edelen second to move Issue #43632 to the Joint Committee

Decision: Full Committee Consensus to forward Issue #43632 to the Joint Committee for consideration

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 completed the referral for Issue **Issue #41899, IRS Navigation Guide and IRS Phone number Link** a proposal to add a navigation line for individual tax phone line on www.IRS.gov to include adding the IRS phone number link to the home page. Their recommendation is to forward to the Joint Committee.

Pinkney motioned and Lacy Rice second to move Issue #41899 to the Joint Committee pending Systemic Advocacy feedback

Decision: Full Committee Consensus to forward Issue #41899 to the Joint Committee pending SA feedback

Outreach

Rice stated the Outreach Committee met on September 17, 2020. During the meeting it was noted the ending of the TAP year was approaching.

- Members were encouraged to use the Outreach Toolbox because it is a valuable resource
- Rice stressed the importance to participate in some form of Outreach activity. Family and friends can be utilized and help with total Outreach hours
- A question arose during the meeting on the Presidential Awards hours. Members receive an award at the end of their third-year term based upon the number of hours reported. Members were encouraged to reach out to Rosalind Matherne to obtain their total hours
- For the month of September, the Outreach Activity reports were at 100%

- Rice will forward a copy of the Outreach Report to members later today after he has totaled the hours

Internal Communications Committee (ICC)

Edelen stated the ICC met on September 22, 2020. Several issues were discussed during their meeting.

- Laurie Brock talked about the Annual Report during her Chair Report. A draft copy of the Annual Report was submitted by Laurie
- There was a discussion regarding the www.TAPSpace.org redesign
- The TAP member checklist was also discussed

Roundtable

- Kleiber recognized Peterson and Pinkney for their work as Subcommittee Chairs and pushing referrals through. He informed the Committee of an incident with the Toll-Free Practitioners' telephone line. Matherne was able to involve the JOC to make them aware of the issue and will report back to the Committee with any update.

Action Items

Rosalind Matherne stated she will:

- Post September 8, 2020 approved Minutes onto www.TAPSpace.org
- Drop **Issue #43428, Staffing and Wait Times** and **#Issue 43608, Spam Call**
- Associate **Issue #43648, 1040 toll free line - languages other than English** with **Issue #43632, Reposition Foreign Language Prompts on 1040 Toll Free Line**
- Drop **Issue #40124, Taxpayer's Contact Information if Disconnected from Customer Service Representative**
- Forward **Issues #43632, Reposition Foreign Language Prompts on 1040 Toll Free Line** and **Issue #41899, IRS Navigation Guide and IRS Phone number Link** to the Joint Committee pending SA and Attorney Advisory review and approval

Jimerson thanked members for the good work being done despite all the challenges this year. Matherne will follow-up with each member with the total number of TAP hours reported.

Close

Jimerson officially closed the meeting.

**Next Meeting: Thursday, November 12, 2020,
12:00 PM EDT, 11:00 AM CDT, 10:00 AM MDT, 9:00 AM PDT**

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



**Toll Free Phone Lines Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, September 9, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- | | | |
|-----------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph (Joe) Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Michael Odom | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. TAP Director, Terrie English was not able to attend the call. A review of the Agenda was shared. The following upcoming meetings were shared:

- The Annual Report Committee will meet on September 11, 2020.
Jimerson will provide the time for this meeting
- The Outreach Committee meeting will meet on September 17, 2020 beginning at 12:00 pm, EDT. This Committee is led by the TAP Vice Chair, Robert Moretti and attended by the Vice Chairs of the Project Committees.
- Internal Communications Committee (ICC) will meet on September 22, 2020 beginning at 3:00 pm, EDT. Discussions will be held on various communications items such as the Newsletter, Facebook and other media items.

- The Joint Committee monthly meeting will be held on September 24, 2020 beginning at 1:30 pm, EDT. This meeting is open to the public and led by TAP Chair, Phil Kleiber.

Chair Report

Andrea Price welcomed everyone to the call. She attended both Subcommittee meetings. Appreciation expressed to the DFO for allowing the meeting to go past the allotted time.

- There are two more meetings remaining for TAP year ending on November 30, 2020
- The Joint Committee's Planning Sessions were held on August 25, 2020 and August 26, 2020. Each session was held for two hours. Thank you to Joseph Edelen for attending.

Comments regarding how the year is going:

- More time to be able to work and collaborate on issues and do the research
- Improve the mentoring process
- Revisit the interview process/questions asked to potential TAP members details of the time commitment along with the calendar of meetings. Consider replacing members faster if they cannot commit to responsibility.
- Committees should maintain a list of referrals previous sent to IRS
- Unbalanced workload
- How to strategically solve issues instead of one-by-one
- Automate the activity report process
- Reset expectations for virtual outreach activities
- Onboarding committee to educate new members
- Understand why some committees take longer to produce referrals
- Face to face meetings are critically important
- Video portion of WebEx not able to be utilized to see each other during committee meetings.

Election Planning for TAP Chair and Vice Chair positions:

- October 20, 2020 Role of the TAP Chair or Vice-Chair
- October 26, 2020 Nominations due by 12:00 am, EDT
- October 30, 2020 Campaign letters are due by 12:00 am, EDT
- November 5, 2020 Meet the Candidates session
- November 13, 2020 Ballots sent to members
- November 13, 2020 Voting/completed ballots due by 12:00 am, EDT
- November 17, 2020 Results announced

TAP Member Survey Results:

- Cedric Jeans stated that the purpose of the TAP annual survey is how TAP can improve
- Overall satisfaction declined from 2018 to 2019. The government shutdown and late start to the TAP year may have played a big part
- Outreach training is an area of opportunity to be improved: Establishing relationship with LTA; Gathering sources from prior members; Improving www.TAPSpace.org and utilizing the Outreach Toolkit
- More training for mentors and pairing at the Face-to-Face meetings to enhance the relationships
- The Joint Committee met on August 27, 2020. Appreciation was expressed to Donna Burris for attending
- Tax Forms and Publications Committee submitted 4-5 referrals for approval from tax practitioners
- Notices and Correspondence committee submitted 1 referral for approval (improve notice language in CP515). A request from Office of Tax Correspondence CP notices
- Taxpayer Communication submitted 1 referral on how to communicate better with military taxpayers
- The other three committees did not submit referrals

Other items discussed:

- Approval of TAP's new logo
- Approval of TAP's bylaws
- It is time to draft the 2020 TAP Annual Report. An annual report committee has been set up to provide quality reviews for each committee's Chair report. Bernard Peterson and Cynthia Pinkney have agreed to send Price their respective subcommittee information by October 1, 2020

Minutes Approval

August 12, 2020 Toll Free Phone Lines (TFPL) Minutes were approved as submitted.

Public Comments

None

Screening Report

Price stated a copy of the Screening Report was submitted with the pre-reads for today's call. The Screening Committee met in August. Five of the issues were

dropped. Seven active issues are opened and assigned to the Subcommittees. One was placed in the Parking Lot - **Issue #43094 Add Wait time to be on Hold Clock to IRS.Gov**, a proposal to add a real time wait time chart on www.irs.gov

Edelen motioned and Bernard Peterson seconded
Decision: Full Committee Consensus approve Screening Report

Subcommittees Report

Subcommittee 1

Bernard Peterson stated Subcommittee 1 had their meeting on September 3, 2020. They discussed the following:

- **Issue #43430 Delayed Returns for 2019** Taxpayer filed a return and an amended return and did not receive status of return. Recommended issue be dropped
- **Issue #43595 Taxpayers Should be Able to leave Callback**
Subcommittee 1 recommended issue be dropped.

Peterson motioned and Lacy Rice seconded
Decision: Full Committee consensus to drop issues #43430 and #43595

Subcommittee 1 is working the following issues:

- **Issue #42231 IRS 1040 Telephone Number in the 1040 Instructions**
- **Issue #43632 Reposition 1040 Telephone Prompts**
- **Issue #41110 Taxpayer Survey Data Reports**

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 referred two issues to Systemic Advocacy and the Attorney Advisor. They recommend both issues be forwarded to the Joint Committee.

- **Issue #43095 Revamp 1040 Prompt Structure** which is a referral to add a go back feature to the Toll-Free phone line
- **Issue #43463 Area Code Added to Voice Response Unit (VRU)** which is a referral to update the Toll-Free phone line based on the normal hours of business for the area code from which the taxpayer is calling from.

Pinkney motioned and Lacy Rice seconded
Decision: Full Committee consensus to forward Issues #43095 and #43463 to the Joint Committee pending Systemic Advocacy and Attorney Advisor review

Subcommittee 2 is currently working on the following:

- **Issue #41899 IRS Navigation Guide and IRS Phone Number Link** which is a referral to add a navigation guide to include adding the IRS phone number link to the home page on www.irs.gov

The following issue was placed in the Parking Lot:

- **Issue #43501 Out-of-Scope Topics** which is a proposal to reposition the Out-of-Scope Topics list on www.IRS.gov

**Pinkney motioned and Phillip Kleiber seconded
Decision: Full Committee consensus to place Issues #43501 and #43094 in the Parking Lot**

Outreach

Lacy Rice informed members the Toolbox is ready for use. It has been approved by the Outreach Chair and DFO.

- A reminder to members that the Activity Reports are due by the 25th of each month
- 100 percent accountability for this month
- 9.2 Outreach hours
- 101,571 people reached
- 134.5 overall activity hours
- Encouragement to members to do virtual outreach by the end of the TAP year
- Donna Burris shared her Outreach activity for the month.

Internal Communications Committee (ICC)

Joseph Edelen stated ICC met on August 25, 2020 and shared the following:

- Members were encouraged to read the Newsletter to find out what other Project Committees are doing
- Partnering with the Outreach committee was discussed as one of the 2021 projects

Roundtable

- Kleiber stated the Onboarding Committee had one call with Terrie English and the team will meet in November or December to work on an upgraded tool in addition to WebEx in 2021. Members were encouraged to consider being a part of the Onboarding Committee
- **SA- Systemic Advisor (Systemic Advocacy)** a unit within TAS. They work on the Annual Report and complete research, advocacy issues, review referrals

- **AA- Attorney Advisor (Attorney Advisory)** work on any legal or procedural issues relative to the National Taxpayer Advocate Report to Congress

Action Items

Rosalind Matherne stated she will:

- Update SAMS to show dropped Issues #43430 and #43595
- Send Issue #41110 Survey narratives to members
- Will share responses from SA and AA on Issues #43095 and #43463
- Place Issues #43501 and #43094 in the Parking Lot

Jimerson thanked members for attending the call. If any questions or comments need to be addressed, members should reach out to Jimerson or Matherne. Members were encouraged to stay safe.

Close

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, October 14, 2020,
11:00 AM EDT, 10:00 AM CDT, 9:00 AM MDT, 12:00 PM PDT**

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 12, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Members Present

- | | | |
|---------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy R. Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Tamikio Bohler | Wage & Investment |
| • Michael Odom | Wage & Investment |
| • Cindy Jones | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. Terrie English was not able to attend the call. The following upcoming meetings were shared:

- Quarterly Virtual TAP meeting will be held on August 17, 2020 beginning at 1:00 p.m. ET. There will be virtual training and information shared on the current events happening within the TAP program.
- The Outreach Committee meeting will be held on August 20, 2020 beginning at 12:00 p.m. ET
- The Annual Planning Session for the Joint Committee (JC) will meet on August 24, 2020. The Chairs of the Project Committees will all attend the session. They will review how the year has gone, the different projects for the upcoming year, discuss the presentative for the Chair and different items involving TAP. There will be two days of two-hour sessions on each day. The first session will be held on August 25, 2020 and the other one on August 26, 2020. They both will begin at 1:30 p.m. ET
- The Joint Committee monthly meeting will be held on August 27, 2020 beginning at 1:30 p.m. ET

- A solicitation was sent out to each member asking for volunteers to participate on the 2020 Annual Report Committee. Members who did not receive the email were encouraged to contact Gilbert Martinez, the Joint Committee Analyst to let him know. He will be responsible for facilitating the meetings in a timely manner.
- Internal Communications Committee (ICC) meeting is scheduled for August 25, 2020. They will work to reschedule the meeting due to a conflict with the JC Planning Session. Matthew O'Sullivan is the Analyst for ICC and will be responsible for rescheduling the meeting
- There are three meetings remaining for the TAP year. Appreciation was expressed to members for their commitment and work being done.
- Jimerson then gave an overview of the Agenda.

Chair Report

Andrea Price welcomed everyone to the call. She expressed thank you to Bernard Peterson for taking the Lead on Subcommittee 1 and to Joseph Edelen for providing the Committee's Newsletter article for August

- Joint Committee will have their Planning Session on August 25, 2020 and August 26, 2020. Price will be attending the meeting
- The Joint Committee met on July 23, 2020. Two of the six committees had referrals for approval by the Joint Committee
- Tax Forms and Publications had five referrals for approval
- Notices and Correspondence submitted four referrals for approval
- Price participated in the Taxpayer First Act Forum on July 16, 2020. It was conducted by the Internal Revenue Service Taxpayer First Act Office.

Three areas of focus:

Taxpayers Experience Strategy, IRS plans to educate Taxpayers by providing information in language. The method Taxpayers prefer. They will improve online web live chat and employees will be trained on for navigation support and expand their platform to Taxpayers who prefer online services or self-services. There will be improvement to the live web chat, for telephone employees to be trained on. This will involve concierge and navigation support for live interaction

Employee Training Strategy, IRS will establish an IRS University to have centralized learning for their employees with some of the latest technology in training curriculum and activities. They will establish a skill and competency assessment. This will help with the workflow planning and hiring efforts.

Organization Redesign Strategy, IRS will provide structure to enable IRS to not only support the Taxpayers experience strategy but the training strategy. They will look at some of the best practices of other industries for possible redesign, compliance processing, more efficient in operations and more specific in the outcome when resolving Taxpayers' compliance issues

- Price attended a second Ohio Stakeholders Liaison Virtual Outreach on July 23, 2020. She provided TAP with the updates.



Minutes Approval

July 8, 2020 TFPL Minutes were approved as submitted

Public Comments

None

Screening Report

There was no Screening Report for this call.

Subcommittees Report

Subcommittee 1

Bernard Peterson stated Subcommittee 1 held their meeting on August 6, 2020. Joseph Edelen and Lacy Rice attended the meeting. The following issues were discussed:

- **Issue 41423 Tax Practitioners' Toll Free Lines and Abilities of Support Staff.** Subcommittee 1 has been working on this issue for a couple of months. It involves CSR training and the inability to answer complicated questions. Debby Awalt provided information on how data is captured and shared. Subcommittee 1 decided to close this issue
- The subcommittee wants to look at responses to surveys for systemic issues.

Decision: Full Committee Consensus to close Issue 41423

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 forwarded the following two referrals for Quality Review:

- **Issue 43095 "Go Back" Options.** A proposal to add a "go back" feature to the Internal Revenue Service (IRS) Toll-Free 1040 phone line. The feature will permit a taxpayer to be able to go back to the previous phone prompt or the main menu. The subcommittee will make the minor changes suggested by the Quality Review (QR) team and will discuss this issue at the next subcommittee meeting.
- **Issue 43463 Area Code Added to Voice Response Unit (VRU).** A proposal to restructure the VRU on IRS' 1040 toll free phone lines to

communicate IRS' normal business hours are based on the area code of the taxpayer's telephone. The QR team reviewed the proposal and didn't make any comments. This issue will be discussed at the next subcommittee meeting.

Pinkney stated Subcommittee 2 is also working on the following two issues:

- **Issue 41899 Contacting the IRS – Call Flow Navigation Guide.** The subcommittee looked at the tax practitioner priority telephone menu on IRS.Gov. It was agreed that something similar should be listed for the 1040 toll free telephone line and perhaps all IRS toll free telephone lines. Phil Kleiber agreed to research and write this proposal.
- **Issue 43501 Out of Scope Telephone Assistors Will Not Answer.** The subcommittee reviewed the IRS website and determined that the "Let Us Help You" page (specifically the list of "topics our assistors can't



address”), needs to be rearranged and given a more prominent position on the website’s home and landing pages. Andrea Price agreed to research and write this proposal.

Outreach

Lacy Rice, Jr. stated that for the month of July the Outreach Committee had a total of:

- 13.6 Outreach hours
- 66,207 people reached
- 110.9 overall activity hours
- The Outreach Committee has been working on the TAPSpace Toolkit, which is almost ready to be used. Members were encouraged to visit TAPSpace and familiarize themselves with the features.
- A Media Guide is also on TAPSpace which is a good resource to use for Outreach when dealing with the media.
- A reminder that Activity reports are due on the twenty-fifth of the month and to forward copies of the report to Rice, Matherne and the TaxpayerAdvocacyPanel@irs.gov.
- Members were encouraged to conduct virtual Outreach.

Internal Communications Committee (ICC)

Joseph Edelen stated ICC met on July 28, 2020 and shared the following:

- The committee discussed the need to finalize the 2020 Annual Report by the end of the year
- Leonard Smith volunteered to work on the September Newsletter and Nina Tross volunteered to work on the October Newsletter.
- Phillip Kleiber stated that he received a response from Terrie English that the use of Zoom is not approved by IRS to use by TAP. The Full Committee had a brief discussion on this issue.

Action Items

Rosalind Matherne stated she will

- Send out the Pre-reads to each subcommittee before the next month’s meeting.
- Send a calendar invite for the next Screening Committee meeting scheduled for August 25, 2020 at 12:00 PM EDT
- Close **Issue 41423** on SAMS

Jimerson expressed appreciation to members for attending today’s meeting. Also, if members have any questions, please reach out to Jimerson or Matherne. Members were encouraged to stay safe.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, September 9, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 8, 2020**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Members Present

- | | | |
|--------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Members Absent

- | | | |
|------------------|----------------|--------|
| • Terrill Flakes | Waynesboro, GA | Member |
|------------------|----------------|--------|

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Tamikio Bohler | Wage & Investment |
| • Michael Odom | Wage & Investment |
| • Cindy Jones | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. Terrie English was not able to attend the call. The following upcoming meetings were shared:

- Outreach Committee meeting is scheduled for 12:30 p.m. ET on July 16, 2020
- The Virtual Tax Forums are approaching. Fred Smith sent a notification to members with information and requested members to participate if they are interested. He will need members to respond by July 9, 2020
- The Joint Committee's meeting is scheduled for 1:30 – 3:00 p.m. ET on July 23, 2020. It is led by Phillip Kleiber, National TAP Chair. Robert Moretti TAP Vice Chair and the Chairs of the Project Committees will be attending. Committee members are encouraged to attend the meeting to get a better understanding of how decisions are made on the referrals going forward to the IRS



- The Internal Communications Committee (ICC) is scheduled for 3:00 p.m. ET on July 28, 2020. The ICC is responsible for the TAP Newsletter, TAP Facebook page information and social media
- Overview of the Agenda was shared

Phillip Kleiber added that the Project Committee Chairs were invited to the Taxpayer First Act Forum on July 16, 2020. He anticipates possible issues will be brought to the attention of TAP.

Chair Report

Andrea Price welcomed everyone to the call. The Subcommittees met on July 2, 2020.

- Price thanked Joe Edelen and Bernard Peterson for their TFPL representation on the ICC. Price also thanked Cynthia Pinkney for accepting the position as Subcommittee 2's Lead
- Price noted that Terrill Flakes could not attend today's meeting
- The Joint Committee met on June 25, 2020. The following committee referrals were approved to move forward to the IRS: Tax Forms and Publications (TFP) submitted seven, Notices and Correspondence Committee submitted four, ICC submitted one on upgrading of www.TAPSpace.org website and Special projects submitted one
- Price stated that Terrie English shared information that the Taxpayer First Act Forum will meet with the TAP Committee Chairs on July 16, 2020. The Vice Chair will attend only if the TAP Chair is unavailable

Minutes Approval

June 10, 2020 TFPL Minutes were approved as submitted

Public Comments

None

Screening Report

There was no Screening Report for this call.

Subcommittees Report

Subcommittee 1

Bernard Peterson stated Subcommittee 1 met on July 2, 2020. Joseph Edelen and Lacy Rice attended the meeting. Price attended the meeting as the TFPL Committee Chair. The following issues were discussed:

- **Issue 40558**, the subcommittee reviewed the response received from the IRS. The IRS did not adopt the reconsideration and Subcommittee 1 decided to accept the IRS response and close this issue
- **Issue 41423**, is a combination of two issues from the Parking Lot. Subcommittee 1 is researching this issue and is still working on it.

Price added that issues raised in Issue 41423 are discussed in detail in the 2017 and 2018 NTA's Annual Report to Congress under the Most Serious Problems.

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 met on July 2, 2020. The following issues were discussed:

- **Issue 43095**, the subcommittee is researching the possibility of adding a feature on the 1040 phone line to allow taxpayers to return to the previous prompt or return to the main menu instead of having to call back and start all over again.
- The subcommittee is also researching the need to clarify the difference between calling the practitioners' line and the business tax prompt on the 1040 phone line. In addition, the subcommittee is also looking into clarifying the IRS business hours by explaining that a taxpayer will reach an office based on their telephone's area code.

Outreach

Lacy Rice stated the following totals regarding TFPL's Outreach activity:

- 15 Outreach hours
- 38,074 people reached
- 109 overall activity hours
- Appreciation was expressed to members for doing a much better job at getting their activity reports turned in
- The next Activity Reports are due on July 25, 2020.
- During the Outreach Committee meeting, the Chair asked for members' feedback describing their Outreach activities. Price gave an overview in May and Kleiber did it for the month of June
- Various ways to conduct Outreach was shared to help spread the word about TAP by using social media, articles, press releases, etc. Members were encouraged to use some of the ideas to conduct their Outreach.
- One project worked on by the Outreach Committee was the Toolbox. Committee members were assigned different items in the Toolbox to review and provide recommendations. Members were encouraged not to access the Archives and 2020 folders while visiting the Toolbox Outreach area on www.TAPSpace.org Those folders are being worked on. The other folders are available to be utilized
- Cedric Jeans provided an article describing what is being done in Outreach. He suggested using the Media Guide as a helpful tool for Outreach ideas
- Members were encouraged to share any ideas they have for Outreach
- Members were sent the LTA list by Matherne. Rice encouraged members to reach out to their LTA for possible events for Outreach
- Jimerson informed the members that a social media guide is currently being developed by ICC which the Joint Committee will review and finalize. It has a lot of information on conducting Outreach. Once completed it will be shared with members.
- Committee members were encouraged to join the TAP Facebook group. The Facebook group may be converted to a Facebook page sometime in the future



Kleiber shared information about press releases which members could use as an Outreach opportunity. He shared his press release with his local CPA Association who published it in their newsletter. Committee members can find the template on TAPSpace.org in the 2020 folder of the Outreach Toolbox. Price agreed this was a great way to share information about TAP.

Internal Communications Committee

Joseph Edelen provided an update for the ICC meeting he attended:

- **Issue 43192**, referral was discussed regarding the redesign of www.TAPSpace.org
- There was discussion regarding converting the Facebook group to a Facebook page.
- Committee members were encouraged to submit ideas and suggestions for the TFPL article. The articles are due by the 25th of the month.

Price thanked Edelen for submitting the ICC newsletter article and suggested that the due date be changed from the 25th of the month to a later date since the Outreach activity reports are due on the same day. The DFO explained the reasoning behind this.

Action Items

Rosalind Matherne stated she will:

- Assign the issue number to the Area Code issue to be submitted as a new referral for reconsideration
- Research and pursue questions for both Subcommittees

Jimerson expressed appreciation to the committee members for all the work being done and encouraged everyone to remain safe and continue to do Outreach.

Close

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, August 12, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**

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



**Toll Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 10, 2020**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Members Present

- | | | |
|--------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Terrie English | TAP Director |
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Debra Awalt | Wage & Investment |
| • Tamikio Bohler | Wage & Investment |
| • Michael Odom | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. Two committee members have resigned: Richard Brouillard from Wisconsin and Thomas Kerr from New York. Donna Burris from New York has been added to TFPL Committee. The following upcoming meetings were shared:

- The Outreach Committee meeting is scheduled for 12:00 p.m. ET on June 18, 2020. Robert Moretti, TAP Vice Chair and all Project Committee Vice Chairs should attend.
- All TAP Virtual Meeting is scheduled for 2:30 p.m. ET on June 18, 2020. The National Taxpayer Advocate is scheduled to speak at this meeting
- The Internal Communications Committee (ICC) is scheduled for 3:00 p.m. ET on June 23, 2020. The ICC works on the TAP Newsletter and TAP's Facebook page
- The Joint Committee is scheduled for 1:30 p.m. ET on June 25, 2020 led by Phillip Kleiber, National TAP Chair. Robert Moretti, TAP Vice Chair and



Chairs of the Project Committees should be in attendance. Committee members are encouraged to attend the meeting

- The interview phase of TAP's recruitment efforts has begun and anticipated ending at the end of June.
- Overview of the Agenda was shared.

National Office Report

Terrie English welcomed everyone to the call and shared the following:

- Some of IRS offices are opening and updated information is being provided daily on www.IRS.gov website. A lot of the call centers are also opening. Information will be shared as it become available
- TAP member business cards and ID badges have been ordered. Due to office closures, they are unable to be mailed to members. Kevin Brown will forward them to each member once the staff is able to return to the office
- TAX Forums will be held virtually this year. Information on how TAP will be integrated into the process will be shared as soon as it becomes available
- On June 18, 2020 there will be an All TAP Virtual Meeting where training will be provided for members. Erin Collins, The National Taxpayer Advocate will be on the call. She will have a questions and answers session for members interaction
- Members are encouraged to attend the Joint Committee monthly meeting scheduled for June 25, 2020. It will be a great opportunity for New Members to learn what goes on during the Joint Committee meetings.
- TAP Interviews are moving forward

Chair Report

Andrea Price welcomed everyone to the call.

- Regretfully TFPL had two members resign from TAP. Richard Brouillard represented Wisconsin and Thomas Kerr represented New York
- Donna Burris joined the Committee and is on the call today. Burris represents the State of New York. Burris introduced herself to the Committee by sharing some of her background information
- Acknowledgement and appreciation to Joe Edelen and Bernard Peterson for their representation on the Internal Communications Committee for the TFPL Committee. Thank you to Cynthia Pinkney for taking the Lead for Subcommittee 2

Minutes Approval

The following May 13, 2020 TFPL Minutes were approved as submitted

Public Comments

None

Screening Report

Price stated the Screening Report Committee met May 26, 2020. Three members were present on the call. A copy of the report was shared with the Full Committee prior to this call. There were four issues:

Issues **Dropped**

- **42027**, a Legislative issue (Taxpayer wanted to submit Tax Return on www.irs.gov website)
- **42166**, individual issue (Taxpayer attempting to contact someone related to their 2016 Tax Return)

Two **Parking Lot** Issues

- **41423**, Tax Practitioners' Toll-Free Line
- **43008**, Tax lines #800

Remaining Issues were assigned to Subcommittee 1 and Subcommittee 2. All calls related to customer service issues would be consolidated into one. The Screening committee will drop the issue on individuals within correctional facilities having limited and no internet access to prepare their taxes.

Decision: Full Committee Consensus accept Screening Committee's report as presented.

Subcommittees Report

Subcommittee 1

Terrill Flakes stated Subcommittee 1 had their meeting on June 04, 2020. They discussed four Issues:

- **42215**, difficulty reaching by phone. **Drop**
- **42072**, support staff issue. **Drop**
- **43008**, TAC Line 800 phone number. This issue was placed in the Parking Lot
- **43094**, Hold Time clock website on www.irs.gov issue to be worked

Phil Kleiber added the Subcommittee will follow up on the response of wait times information is updated on www.irs.gov with a generic message.

Subcommittee 2

Pinkney shared Subcommittee 2 updates for the following Issues:

- **42231**, a meeting will be scheduled for next week to work on the proposal
- **43095**, deals with the 1040 line structure. They are looking at the top four prompts on the phone call and waiting for information from Tamikio Bohler
- **43096**, involves providing toll free service to Taxpayers living overseas. This issue is being moved to Special Projects Committee to work
- **40707**, involves improved access for International Taxpayers. Subcommittee 2 recommendation is to accept IRS response and close this issue

Outreach

Lacy Rice stated the Outreach Committee met recently and Price was on the call. She shared highlights on her Outreach activities with suggestions. Kudos to Price who received recognition from the Outreach Chair.

- Thomas Kerr reached 2.9 million people
- 4.2 hours and Rice has participated in an interview session. The applicant's comfort level was discussed on doing Outreach
- 13.3 total hours of Outreach
- 3,001,572 total Outreach



- 111.9 participation hours
- Rice utilized LinkedIn for Outreach and encouraged members to use social media. He will put a resource list together and share with members. Burris suggested adding a link on individual websites for the questions and answers.

Internal Communications Committee

Jimerson is the oversight Manager for ICC and shared the following information:

- One of the responsibilities of ICC is to publish the TAP Newsletter containing articles from each project committee.
- Articles should be submitted to the ICC Analyst, Matthew O'Sullivan.
- The goal is to have all articles submitted by the 25th of the month. The Newsletter is distributed by the 5th of the following month
- Timeliness submitting articles is appreciated

Action Items

Rosalind Matherne stated she will

- Research hold times for Subcommittee 2 regarding **Issue 42231**
- Schedule another Subcommittee 2 meeting regarding **Issue 43095**. Research available call volume information.
- Schedule a meeting with Awalt and Jimerson regarding **Issue 42215** to determine if it a systemic issue

Close

Jimerson thanked everyone and officially closed the meeting.

**Next Meeting: Wednesday, July 8, 2020
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**

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



**Toll-Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 13, 2020**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Members Present

- | | | |
|----------------------|----------------|------------|
| • Richard Brouillard | Waterloo, WI | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Thomas Kerr | Amherst, NY | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Members Absent

- | | | |
|--------------------|---------------|--------|
| • Bernard Peterson | Cazenovia, NY | Member |
|--------------------|---------------|--------|

Staff

- | | |
|---------------------|-----------------------------|
| • Terrie English | TAP Director |
| • Sheila Andrews | Executive Director, CSO:TAP |
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Tamikio Bohler | Wage & Investment |
| • Michael Odem | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. The following upcoming meetings were shared:

- The Joint Committee monthly meeting is scheduled for 1:30 p.m. ET on May 28, 2020. The meeting is open to the public.
- The Internal Communications Committee monthly meeting is scheduled for 3:00 p.m. ET on May 26, 2020. They will work on the monthly Newsletter, and other projects as well as social media platforms (e.g., FaceBook, etc.).
- The Outreach Committee meeting will be held on May 21, 2020 and the Lead is TAP Vice Chair, Robert Moretti
- The Interview phase for Recruitment will begin at the end of the May. Lisa Billups will send an email solicitation for volunteers to participate in the interview process

Jimerson gave an overview of the Agenda.

National Office Report

Terrie English welcomed everyone to the call. Sheila Andrews, Deputy Director CSO expressed her appreciation to the Full Committee and for all the work being done. English shared the following:

- Updated information is being provided daily on www.IRS.gov website
- Members were reminded to let taxpayers know they can go onto the website to update their information if they are wanting to receive Direct Deposits on the Stimulus checks. IRS has employees going into the campus offices to mail paper checks. The majority of IRS offices are closed
- Next month Virtual meetings will be up and running for training purposes. The training will benefit new members to help identify training needs and ensure members are getting what they need to be successful in TAP. Some suggestions have been received on types of training needed. The date for the training will be shared with everyone.

Chair Report

Andrea Price expressed gratitude to members who stepped up in leadership roles. Members were reminded to inform the Chair and Analysts if they will not be able to attend meetings.

Minutes Approval

The following Minutes were approved as submitted:

- March 26, 2020
- March 27, 2020
- April 8, 2020

Public Comments

- None

Screening Report

Thomas Kerr stated there are 18 Issues on the Screening Report. The Parking Lot Issues:

- **40561**, Add voice recognition associated with Issue 39947
- **41024**, Fax number for Taxpayer Assistance, Transfer to Communications Committee
- **41249**, Involves Taxpayer phone number on website. Drop
- **41399**, Involves two issues on Tax Practitioner's line. Individual issue and will contact submitter. Drop

Parking Lot Issues

- **41423**, **41424** and **41426**, Issues involved with the Tax Practitioner Toll Free Line. Recommend combine all three issues
Parking Lot for further research
- **41712**, this is an individual issue

- **41741**, this is an individual issue, the Analyst will contact the submitter. Drop
- There are six additional Issues the Screening Committee did not get to review. More information to be shared during next month's meeting

Decision: Full Committee Consensus accept the Screening Report as submitted

Subcommittees Report

Subcommittee 1

Terrill Flakes stated Subcommittee 1 had been working Issue **40558** - PSA for ImproveIRS.org on Toll-Free Phone Lines for reconsideration. Lacy Rice wrote the reconsideration to include information needed for the Public Service Announcement on www.ImproveIRS.gov. An added announcement will be heard while waiting on the toll-free phone line. Recommend this issue be elevated. Some of the added highlights include:

- Added background information
- Referenced Taxpayers Bill of Rights
- Highlights on IRS and Taxpayers benefits
- Taxpayer Bill of Rights: Right to Quality Service
- Posting on www.IRS.gov

Action: The reconsideration will be forwarded to Bohler and Michael Odem.

Decision: Full Committee Consensus Accept Subcommittee 1 motion to elevate Issue 40558

Subcommittee 2

Thomas Kerr stated Subcommittee 2 is continuing work on Issues

- **40707**, Lower Cost and Improve Access for International Taxpayers. The Subcommittee had a lengthy discussion with Laura Snyder on taxpayers living aboard and the services available when taxpayers try to reach IRS. The Committee decided to do more research and requested a SME attend the next meeting.
- **40124**, Taxpayers Being Disconnected from the System the Subcommittee 2 discussed the issue with the SME and different roll-out of programs. This issue will be placed on hold until response is received from the IRS by October 2020

Outreach

Lacy Rice stated:

- Members with the Outreach sheet containing row 28 were notified it is the wrong sheet. Contact Rice or Rosalind Matherne for the correct copy
- March to April there were a total of 19.1 hours and total Outreach of 37,317 people
- Members were encouraged to do some type of Outreach
- Price shared tips on doing Outreach during last month's meeting and members were encouraged by them
- Kerr was asked to share for April and each month there will be a member asked to share their Outreach experiences



- Members were reminded that activity reports are due by the 25th of each month and copies should be emailed to Rice, Matherne, Price in addition to a copy sent to the Taxpayer Advocacy Panel mailbox
- Any activity relative to TAP is to be placed on the Activity Report. Contact Rice if there are any questions on completing the reports
- Jimerson reminded members to reach out to their LTAs and if they have not heard back from the LTA let management know
- English added there will be a roll out of information within the next couple of months on how Problem Solving will be handled. Information will be shared with members once finalized and is available

Roundtable

- Rice suggested members reach out to other Committee members within their states for possible Outreach Activities they may be doing
- Price shared ideas on different Outreach Activities she has participated in that could help members in completing their Outreach

Internal Communications Committee

Price stated ICC met on April 28, 2020.

- Joseph Edelen and Cynthia Pinkney agreed to represent ICC
- Pinkney will no longer be available to continue with ICC. A volunteer is needed to be placed in her position. She will remain on the Full Committee
- Laura Brook was elected Chair and Nina Tross as Vice Chair
- Newsletter articles are due the 25th of each month

Action Items

Matherne stated she will

- Update SAMS with Screening Committee's report
- Continue with research on Issue 40707
- Elevate Issue 40558 to IRS for Reconsideration
- Contact SME regarding International calls

Close

Jimerson thanked everyone and officially closed the meeting.

**Next Meeting: Wednesday, June 10, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 12:00 p.m. PT**



**Toll Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 8, 2020**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Members Present

- | | | |
|----------------------|----------------|------------|
| • Richard Brouillard | Waterloo, WI | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Thomas Kerr | Amherst, NY | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Terrie English | TAP Director |
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Debra Awalt | Wage & Investment |
| • Tamikio Bohler | Wage & Investment |
| • Cindy Jones | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Members Absent

None

Quorum

Met

Welcome

Susan Jimerson welcomed everyone to the call. The following upcoming meetings were shared:

- Outreach monthly meeting is scheduled for April 9, 2020 beginning at 1:00 pm EST. The meeting is lead by the TAP Vice Chair and attended by each committee's Vice Chair.
- Joint Committee monthly meeting is scheduled for April 23, 2020 beginning at 1:30 pm EST. The call information has been posted on

www.TAPSpace.org for members who would like to attend. The meeting is attended by the TAP Chair and Vice Chair along with all the Chairs of each committee. It is open to the public.



- Internal Communications Committee has not scheduled a date or time for their meeting. Information will be shared once they have met and scheduled the meeting. The committee will focus on internal and external work.

Jimerson encouraged to search information on www.irs.gov for the most current information on COVID-19 and any questions on the Stimulus Package. She gave an overview of the Agenda for today's meeting.

National Office Report

Terrie English welcomed everyone to the call. The following information was shared:

- Information is being provided daily on the COVID-19 issue. It is difficult getting calls through because a lot of the IRS offices are closed. The systems are overloaded. There is work being done to increase the space.
- Erin Collins, New National Taxpayer Advocate is having meetings with her immediate staff. There is a meeting scheduled for Thursday, April 9, 2020 with the complete staff. English anticipates direction on TAP operations will be provided. Information will be shared with members.

Chair Report

Andrea Price thanked everyone for being on the call.

Public Comments

None

Minutes Approval

March 2020 minutes will be approved during next month's meeting.

Subcommittees Report

Subcommittee 1

Terrill Flakes stated Subcommittee 1 met and discussed

Issue 40558, Having A Public Service Announcement When Taxpayers are on Hold. Lacy Rice will be writing up the rebuttal by April 11, 2020 for review. Information was shared with Rosalind Matherne on April 06, 2020. The Subcommittee did not agree with the response they received from IRS. They will be submitting the rebuttal.

Subcommittee 2

Thomas Kerr stated Subcommittee 2 is working on the following:

- **Issue 40707 -- Lower Cost and Improve Access for International Taxpayers** has five different parts: **1627, 1628, 1629, 1630 and 1631 on Using the Toll-Free System.**
- **Issue 40124, Taxpayers Being Disconnected from the System** the Subcommittee 2 has questions to put forward from focus groups to implement changes
- They will proceed cautiously because there is stress on IRS due to the COVID-19 and Stimulus order. A SME is requested for questions during their next meeting.

Outreach

Lacy Rice stated it was shared during the Face to Face meeting

- Send the Outreach Reports to Matherne and then a copy to him
- Correctly input the title with the year, committee name and subject on the report
- Returning members were advised in December 2019 to continue Outreach activities
- Price has been doing a great job with Outreach. Price was asked to speak during next month's meeting on some of the Outreach Activities she has been involved with.
- Rice will ask one member each month to share their Outreach experiences
- Social Media was a shared example of doing virtual Outreach to promote TAP application season. Members were encouraged to utilize Facebook for this purpose.

Rice shared two issues they are having with the Outreach Reports:

- Cumulative hours are not correct at the top of the report. There are two lines and one of the lines will need to be deleted.
- In the drop-down column members were advised not to add additional information. Once scrolling through the choices, if the choices provided within the column does not list what is needed, members should contact Matherne and Rice know.

Cedric Jeans TAP East Manager forwarded a copy of the Guide for Activity Reports to each member. Matherne will resend the Guide to the full Committee. Members were advised to contact Matherne with any issues.

Rice stated the following to stress the importance:

- Follow the Guide to help prevent problems
- Input and no correlation, let Matherne and Rice know
- Do not make any changes to the Report itself
- A total of four Activity Reports were received for the month
- Contact will be made to members for any issues in getting the reports completed and turned in
- The Excel spreadsheet will be reviewed to correct the numbers from being doubled. The formula will be correct.
- Copies of all Activity Reports goes to Rosalind Matherne, Lacy Rice and to the TAP mailbox

Roundtable

- Price thanked members who served on the committees with a special appreciation to Joseph Edelen and Cynthia Pinkney
- Matherne and Price working to assist in scheduling the Screening Committee. The meetings will be done on an Ad Hoc basis and will be shared with committee members
- Phillip Kleiber inquired on the status of the 1040 Line. Debby Awalt responded the line is down and they have not been advised as to when it



will resume. Members advised to search www.IRS.gov for the best source of updated information

Action Items

Matherne stated she will

- Update information on Issue 40558, Public Service Announcement, Subcommittee 1 working on the reconsideration. Rice will write it up
- Issues 40707 and 40124 request SME for next meeting
- Work with Rice on updating all Activity Reports
- Send copy of the Activity Report Master Guide to members
- Send the Joint Committee Meeting's call in information to members

The TAP Member Handbook is with the Publisher and the Annual Report is being printed. Copies will be shared with members as soon as TAP Staff is able to get back into the office. English added the copies will be delivered to the National Office at that time Kevin Brown will be sending out to each member. Members were encouraged to go online to view updates.

Tamikio Bohler added members should be aware of updates on www.IRS.gov on

- Peoples First Initiative
- OIC Steps for Taxpayers
- OIC payments suspended
- Interest continuation on unpaid balances

Close

Jimerson thanked everyone and officially closed the meeting.

**Next Meeting: Wednesday, May 13, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 12:00 p.m. PT**

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



**Toll Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 26, 2020**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|----------------------|----------------|--------|
| • Richard Brouillard | Waterloo, WI | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Thomas Kerr | Amherst, NY | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Member |
| • Lacy Rice | Radcliff, KY | Member |

TAP Staff Present

- Susan Jimerson, Chief TAP West
- Rosalind Matherne, TAP Analyst
- Matthew O'Sullivan, TAP Analyst

IRS Staff Present

- Debra Awalt, IRS W&I
- Tamikio Bohler, IRS W&I

Members of the Public

N/A

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Susan welcomed everyone to the meeting, reviewed the agenda and explained the TAP Mission. Susan Jimerson asked if there were any members of the public on the call. There were none.

Introductions of TAP Members and Staff

All attendees introduced themselves, explaining where they are from, their experience and if they're interested in leadership on the committee.



TAP Meeting Procedures

Rosalind Matherne reviewed the TAP Meeting Procedures and Ground Rules. Susan Jimerson reminded the members to CC TAP Staff and the

*TaxpayerAdvocacyPanel.gov Mailbox on TAP related e-mails in accordance with the Federal Advisory Committee Act (FACA) guidelines. She also reminded the members to call TAP Staff if they needed to discuss any issues or if they were unable to attend meetings. Andrea Price asked for a clarification of TAP Staff. Susan explained that they should contact the Roz Matherne or Susan Jimerson with their concerns.

Lacy Rice asked about the appropriate e-mail subject lines. Susan explained that the subject line should include the year, followed by a colon, then the committee name followed by a colon, then the subject.

Rosalind advised the committee to not do a “reply to all” on e-mails and only CC individuals that have a need to know the information.

Phillip Kleiber mentioned that the call-in number listed on Web Ex is not the correct number to use for the audio portion of the call. He advised the members to only use the phone number and access code as provided by Rosalind for all the committee meetings. He also advised the members to not go directly to IRS Staff with questions. Susan indicated that the members should only go to Rosalind and the other TAP Staff members with their questions, to not go directly to IRS staff because they have other duties besides dealing with the TAP.

Susan advised the members that TAP documents are all posted in TAPSpace. They can review documents from the current year, and from prior years. Members can also review current tax information in www.irs.gov.

Lacy Rice mentioned that last year he received a notice from Terrie English (TAP Director) about retrieving and sending prior TAP e-mails. Susan explained that this was a required action to come into compliance with the FACA record keeping requirements. Lacy then asked about recording the committee meetings. Susan explained that to do so would require the permission of all the participants in the meetings and then having to archive the recordings. This would not be feasible at this time.

Lacy inquired about the information available on the FACA website concerning other agencies. Susan indicated that she would assist him on this matter offline.

Chair and Vice Chair Elections

Rosalind presented the “So You Want to be a Chair” PowerPoint. Phillip Kleiber, the 2020 TAP Chair, discussed what you could expect when you become a Chair based upon his experience as the committee Chair last year.

The committee members nominated Lacy Rice and Andrea Price for committee Chair. Andrea Price was elected committee Chair.



The committee members nominated Lacy Rice and Cynthia Pinkney for committee Vice Chair. Cynthia Pinkney declined the nomination. Lacy Rice was elected committee Vice Chair.

End of Day Announcements/Closing

Susan and Lacy reminded the members to submit their Activity Reports. Susan thanked everyone for joining, congratulated Andrea and Lacy for their selection as Chair and Vice Chair, asked them to remain on the call to prepare for the following day's meeting. Susan reminded everyone on the call of tomorrow's meeting. The meeting was officially closed.

Next Meeting: March 27, 2020



**Toll Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 27, 2020**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|----------------------|----------------|--------|
| • Richard Brouillard | Waterloo, WI | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Thomas Kerr | Amherst, NY | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Member |
| • Lacy Rice | Radcliff, KY | Member |

TAP Staff Present

- Susan Jimerson, Chief TAP West
- Rosalind Matherne, TAP Analyst
- Matthew O'Sullivan, TAP Analyst

IRS Staff Present

- Tamikio Bohler, IRS W&I

Members of the Public

N/A

Opening/Welcome – Susan Jimerson

Susan Jimerson and Andrea Price opened the meeting and reviewed the agenda.

Roll Call

Rosalind Matherne took the Roll Call. Quorum was met

Public Comments

Andrea Price requested Public Comments. There were no members of the public on the call.

Meeting Minutes

Andrea reviewed the November Meeting Minutes. Lacy Price noted some typographical errors on the November Minutes. The errors were corrected and the November Minutes were approved by the Committee as edited.



Full Committee Meeting Schedule

The Full Committee Meetings were scheduled for the 2nd Wednesday of each month from 11:00 am to 12:00 pm Eastern time.

Project Committee Assignment

Subcommittee 1 will include the following members:

- Joseph Edelen
- Terrill Flakes
- Bernard Peterson
- Lacy Rice

The Subcommittee 1 meetings are scheduled on the 1st Thursday of each month from 11:00 am to 12:00 pm each month. The Subcommittee Lead will be determined at the first meeting.

Subcommittee 2 will include the following members:

- Richard Brouillard
- Thomas Kerr
- Phillip Kleiber
- Cynthia Pinkney
- Andrea Price
- The Subcommittee 2 meetings are scheduled on the 1st Thursday of each month from 1:00 pm to 2:00 pm each month. The Subcommittee Lead will be determined at the first meeting.

The Screening Committee will include the following members:

- Andrea Price
- Thomas Kerr
- Lacy Rice
- Richard Brouillard

Meeting dates and times to be determined

The Quality Review Committee will include the following members:

- Cynthia Pinkney
- Thomas Kerr
- Richard Brouillard
- Terrill Flakes
- Bernard Peterson

This Committee will meet on an ad hoc basis.

The Internal Communications Committee will include the following member:

- Joseph Edelen

Meeting dates and times to be determined.

Rosalind will send the Committee members an e-mail to the Committee members explaining in detail the responsibilities of the members of the different subcommittees.

Review of IRS Responses

Rosalind discussed the responses from IRS received by the Committee:



- Issue 40588 PSA on Improveirs.gov on toll-free lines

Susan explained the processing of referrals sent by TAP to the IRS and the review of IRS responses by the Committee. In this case, the IRS did not accept the TAS recommendation. The Committee determined that this matter needed further review before responding to the IRS. Subcommittee 1 will take up this issue at their next meeting.

- Issue #40707 – High Cost for International TPs to call IRS
- Issue #40124 – TP Contact Information if Disconnected from CSR

The Committee determined that both issues above need to be further reviewed before determining an appropriate response to IRS.

W&I 2020 Project

2020 Project Committee Work Issue 42046 – Wait Times to Speak to a CSR
Rosalind then addressed the Project previously assigned to the Committee by IRS. Tamikio Bohler indicated that the Project has been pulled by IRS. At present, with the TAC offices closed and many more people calling IRS due to the Corona Virus it is not feasible to currently assess the effectiveness of the current toll-free system. Andrea Price suggested that the Committee review the currently available information to come up with questions to refer to IRS. This will allow the Committee to determine an appropriate course of action. Andrea also discussed the selection of the new National Taxpayer Advocate.

Meeting Assessment/Closing

Susan closed the meeting.

Next Meeting: April 8, 2020

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