

**Toll Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, March 9, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-------------------|--------------------|------------|
| • Donna Burris | Brooklyn, NY | Member |
| • Joseph Edelen | Vermillion, SD | Member |
| • Pamela Memmer | Princeton, IN | Vice Chair |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Member |
| • Lacy Rice, Jr. | Corpus Christi, TX | Chair |
| • Ying Sa | Des Moines, IA | Member |
| • April Smith | Birmingham, AL | Member |
| • Rene Tiongquico | Washington, DC | Member |
| • John Yoon | Carlsbad, CA | Member |

Staff

- | | |
|---------------------|--|
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Debra Awalt | Wage & Investment Customer Account
Services (W&I CAS) |
| • Dale Hawkins | W&I Operations Support |
| • Michael Odom | W&I Operations Support |

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. She reviewed the Agenda, as follows:

- One of her responsibilities is to provide oversight to this committee and to make sure meetings start and end on time
- Rosalind Matherne is the analyst assigned to this committee and will assist with the meetings

- One of TAP's expectations is for members to actively participate in developing recommendations for the Internal Revenue Service (IRS) by research and writing up sections of the referrals
- Matherne will keep track of tasks assigned to members
- Committee members who are unable to take on an assignment for any reason, are encouraged to call or email Matherne or Jimerson
- The Internal Communications Committee (ICC) is scheduled to meet on March 16, 2021 at which time they will elect their Committee Lead. The ICC publishes TAP's monthly newsletter and works on various projects including social media.

National Office Report

Terrie English welcomed members to the call.

- TAP'S Quarterly Meeting will be held on March 18, 2021 beginning at 2:30 pm, EDT. The National Taxpayer Advocate, Erin Collins, will be on the call. Maryclaire Ramsey, CSO Director and Sheila Andrews, CSO Deputy Director will also be attending the meeting. Members were encouraged to attend. The meeting will not be open to the public
- The Joint Committee (JC) will have their monthly meeting on March 25, 2021 at 1:30 pm EDT. The TAP Chair and Project Committee Chairs are required to attend this meeting, and all members are welcomed

Chair Report

Lacy Rice, Jr. welcomed everyone to the call. He stressed that:

- All work done is on behalf of all Taxpayers
- Any Outreach will be done to benefit all Taxpayers
- Decisions are made on what's best for the Taxpayers

Minutes Approval

Joe Edelen moved that the Minutes of February 10, 2021 be approved as submitted. It was seconded by Andrea Price. The motion was adopted.

Members of the Public

No members of the public were present.

Program Owner

Michael Odom stated that the Reconsideration for Issue #43095 – *Go Back Options* has been extended to March 15, 2021

Screening Committee

Andrea Price stated the Screening Committee has a scheduled meeting on March 31, 2021 and their report will be shared during next month's meeting.

Subcommittee 1

Ying Sa shared the following for Subcommittee 1:

- **Issue #42231** *IRS Telephone Number Should be Listed on the 1040 Instructions*. The Subcommittee agreed to accept the IRS response. Rene Tiongquico expressed concerns on not submitting a rebuttal. After discussions with the Full Committee, Issue #42231 will be reassigned to Subcommittee 2 for further discussion and rebuttal for reconsideration

Subcommittee 2

Cynthia Pinkney shared the following for Subcommittee 2:

- **Issue #43095** *“Go Back” Option* As mentioned in the Program Owner’s Report, W&I asked for an extension to respond by March 15, 2021

Outreach

Pamela Memmer provided the following Outreach activity:

- December 2020, a total of 11.6 Outreach hours conducted and 12,500 people reached
- January 2021, a total of 26.8 Outreach hours conducted and 12,693 people reached
- February 2021, a total of 12.5 Outreach hours conducted and 7,631 people reached
- Total hours from December to February 32,834.
- All Activity Reports have been submitted with 100% participation. Great job TFPL members!

Internal Communications

Matherne stated that Rene Tiongquico will be representing the TFPL Committee on the ICC. Tiongquico will attend ICC’s first meeting on March 16, 2021 and will provide a report at next month’s Full Committee Meeting.

Action Items

Matherne shared the following Action items:

- Post approved TFPL February 10, 2021 Full Committee Meeting Minutes
- Update SAMs with Issue #42231 for Subcommittee 2 and Issue #43501 with W&I extension to March 15, 2021

Jimerson encouraged members to visit the www.TAPSpace.org website and provide feedback on what works or does not work.

Close

Jimerson officially closed the meeting at 11:58 AM EDT.

**Next Meeting: Tuesday, April 13, 2021
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.