

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 13, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-------------------|--------------------|------------|
| • 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 |
| • April Smith | Birmingham, AL | Member |
| • Rene Tiongquico | Washington, DC | Member |
| • John Yoon | Carlsbad, CA | Member |

Members Absent

- | | | |
|----------------|----------------|--------|
| • Donna Burris | Brooklyn, NY | Member |
| • Ying Sa | Des Moines, IA | 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 |

Quorum

A quorum was met.

Welcome

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

- Members were encouraged to take advantage of the valuable information on the www.IRS.gov website. It has a lot of information regarding the latest events

- Members were encouraged to complete their profiles on www.ImproveIRS.org
- Internal Communications Committee will have a monthly meeting on April 21, 2021, beginning at noon, EDT
- The Outreach Committee will have their monthly meeting on April 21, 2021, starting at 2:00 PM, EDT
- The Joint Committee will have their monthly meeting on April 22, 2021, beginning at 1:30 PM EDT. It will last 1.5 hours. Members were encouraged to attend the meeting to get a better understanding of what happens during the Joint Committee meetings
- The Mentorship Program is scheduled later in April. Rosalind Matherne is the Analyst assigned to the program and will send a calendar invite to members.

National Office Report

Terrie English thanked everyone for being on the call. She shared the following information:

- TAP Recruitment period has begun. It will end on May 14, 2021. Members were encouraged to spread the word to candidates who may be interested in becoming a member of TAP
- TAP Quarterly Meeting will be held on June 17, 2021 beginning at 1:00 PM EDT. A speaker from IRS will be attending and will respond to questions. TAP staff will send additional information and a calendar invite to TAP members.

Chair Report

Lacy Rice, Jr. welcomed everyone to the call. He shared the following updates:

- The Joint Committee (JC) had their meeting on March 25, 2021 and will have their meeting every fourth Thursday of the month beginning at 1:30 PM, EDT until 3:00 PM, EDT. Members were all encouraged to attend the JC meetings
- The work done by committees is to advocate on behalf of taxpayers
- Members were reminded to take advantage of opportunities to conduct outreach utilizing social media.

Minutes Approval

Joe Edelen moved that the Minutes of March 10, 2021, be approved as submitted. Rene Tiongquico seconded it. The motion was adopted.

Members of the Public

No members of the public were present.

Program Owner

Michael Odom stated:

- **Issue #43095** *Go Back Options* is under consideration with a follow-up date of August 1, 2021.

Screening Committee

Andrea Price stated the Screening Committee met on March 31, 2021. She provided an update on seven items that were submitted by Taxpayers:

- Four **Issues: #43840** *Economic Impact Payment - 1040 claim dependent box*, **#43844** *Contacting the IRS*, **#44413** *Credit for our owed taxes*, **#44527** *Tried to contact the TAS*. The Screening Committee decided to drop all four Issues after the Analyst contact taxpayers and refer them to TAS.
- **Issue #44516** *Taxpayer requests LITC information* and **#44402** *Para cuando estara listo me impacto economico tene* were both dropped as individual issues and the taxpayers submitted no contact information.
- **Issue #47303** *Problem with Phone Systems* was associated with **Issue #43501** *Out of Scope Topics Telephone Assistors will not Answer* to be worked

The Screening Committee motioned, and Pamela Memmer seconded to accept the Screening Report as submitted.

Decision: Full Committee Consensus accept the Screening Committee Report as submitted

Subcommittee 1

Price stated Subcommittee1 reviewed 2 Issues:

- **Issue #43632** *Reposition Telephone Prompts*; Members discussed the IRS rejection response. Subcommittee 1 decided to draft a rebuttal. Donna Burris will conduct further research and prepare a rebuttal by April 20, 2021.
- **Issue #43501** *Out of Scope Topics Telephone Assistors will not answer* Subcommittee 1 reviewed the Issue and was pleased that IRS has implemented their recommendation though TAP did not receive credit for it. Subcommittee 1 members will review associating **Issue #47303** with **Issue #43501** during their next meeting

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 began work on two referrals:

- **Issue #43395** *Recommending IRS Update CP141L Notice to include the correct telephone number*
- **Issue #48550** *asks IRS to add a Public Service Announcement to Out-of-Scope list on the website.*

- **Issue #42231** *IRS telephone numbers should be listed in the 1040 Instructions* Subcommittee 2 is working on submitting a reconsideration to include the telephone number

Outreach

Pamela Memmer provided the following Outreach activity:

- March reporting:
 - 100% timely Activity Reports submitted
 - 81.4 participation hours
 - 47 Outreach hours
 - 20,891 Audience
- The different activities reported for March were from YouTube and Facebook Live activities, long posts from various organizations, discussions with co-workers, families, and friends

Internal Communications Committee (ICC)

Rene Tiongquico shared the following updates for ICC:

- The ICC had its first meeting on March 16, 2021. They discussed establishing regularly scheduled meetings, ICC news reporting on www.ImproveIRS.org, and discussions with new and old TAP members on conducting Outreach
- Tiongquico added he shared an update on their work on Social Media during their meeting
- Updating the webpage to align with Social Media guidelines
- March 24, 2021, Tiongquico shared updates from TFPL on responses received from IRS; Subcommittee 1 *Go Back Option*, Subcommittee 2 the *IRS Phone Line and 1040 Instructions* providing the telephone option. He shared information on organizational activities, and W&I briefings received.
- ICC will share additional updates during their report.

Tiongquico assured Price he would follow up on the missing information for what Committees were doing on Outreach in the Newsletter and share with the Full Committee. Jimerson added Articles are due by the 25th of the month. Members were encouraged to report their Outreach numbers and submit a brief update to Tiongquico to add to the Newsletter.

Action Items

Matherne shared the following Action items:

- Post the approved TFPL March 10, 2021 Meeting Minutes as corrected
- Forward response from W&I when Call Back Options are received

- Closing Issues from the Screening Report: **#43840, #43844, #44413, #44527** and **#44402**. She will contact the taxpayers as appropriate
- Forward **Issue #44516** to LITC for the information requested and associate with **Issue #47303**

Roundtable

- Price stated her pleasant surprise to discover that The Taxpayer Bill of Rights (TBOR) is provided with a CP295A Notice. She requested that feedback is given to W&I that it is a great way to notify taxpayers that the TBOR exists.
- Rice stated members put in a lot of work, especially on referrals sent in, and would like to see more consideration from the taxpayers' viewpoint. Terrie English will discuss with Rice offline. Rice stated that TAP members work hard on referrals submitted to the IRS on behalf of taxpayers and would like to see referrals taken more seriously. Terrie English asked Rice to follow up with her to discuss.

Jimerson thanked the members for their efforts and reiterated that they are valued and appreciated. The TAP Staff advocates for each TAP member.

Close

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, May 11, 2021
11:00 AM EDT, 10:00 AM CDT, 9:00 AM MDT, 8:00 AM PDT**

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