

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, May 11, 2021**

Designated Federal Officer (DFO)

- 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 |
| • Rene Tiongquico | Washington, DC | Member |
| • John Yoon | Carlsbad, CA | Member |

Members Absent

- | | | |
|---------------|----------------|--------|
| • April Smith | Birmingham, AL | Member |
| • Ying Sa | Des Moines, IA | Member |

Staff

- | | |
|---------------------|---|
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | 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 |
| • Brian Foltz | U.S. Treasury Inspector General for Tax
Administration (TIGTA) |
| • Catherine Sykes | TIGTA |

Quorum

A quorum was met.

Welcome

Susan Jimerson welcomed everyone to the call and opened the meeting. She provided an overview of the Agenda and the following DFO updates:

- Members were reminded to take advantage of the valuable information on the www.irs.gov website
- Internal Communications Committee (ICC) will have a monthly meeting on May 19, 2021, beginning at 12:00 PM EDT. This committee reviews the TAP Facebook page, the TAP Newsletter and other communication methods to promote TAP
- The Outreach Committee will have their monthly meeting on May 19, 2021, starting at 2:00 PM EDT. Nina Tross is the TAP Vice-Chair leading the committee.
- The Joint Committee will have their monthly meeting on May 27, 2021, beginning at 1:30 PM EDT. Members were encouraged to attend the meeting to get a better understanding of what happens during the Joint Committee meetings

National Office Report

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

- IRS filing season is May 17, 2021. Members were encouraged to go to the www.irs.gov website for information on timely filing of Returns
- TAP Quarterly Meeting will be held on June 17, 2021, beginning at 1:00 PM EDT. TAP members will receive a Zoom invite.
- TAP Business cards and ID Badges were mailed to members. Please contact your Analyst or Manager if you have not received them.
- TAP Chair and Vice Chair will lead the focus group meeting for the Underserved Native Americans. Members have been asked to attend the call to provide feedback
- The virtual Tax Forums will be held this year, and Fred Smith will share the information when available.

Chair Report

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

- The Joint Committee Meeting was held on April 22, 2021
- Six issues were elevated to the IRS
- Members were reminded about their TAP commitment to represent Taxpayers and obtain feedback on how the IRS can improve customer service and programs. Committee members are expected to participate and attend meetings in addition to working issues and conducting Outreach.

Minutes Approval

Joe Edelen moved that TFPL Minutes for April 13, 2021, be approved with correction. Rene Tiongquico seconded it. The motion was adopted.

Members of the Public

No members of the public are on the call.

Program Owner

Michael Odom stated:

- W&I has no open referrals for the TFPL Committee
- **Issue #43095** *Go Back Options* is under consideration with a follow-up date of August 1, 2021
- The list for the 87 toll-free phone numbers will be provided by May 17, 2021

Screening Committee

Andrea Price stated the Screening Committee met on April 20, 2021 and again on April 27, 2021. The Committee screened a total of 33 issues.

Joseph Edelen motioned, and Price seconded to accept the Screening Report as submitted.

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

Subcommittee 1

Rosalind Matherne stated Subcommittee 1 met on May 4, 2021, and provided the following updates:

- **Issue #43632** *Reposition Telephone Prompts* Upon the review of the reconsideration, and Subcommittee 1 will request the IRS to update the response
- **Issue #44245** *Natural Language Pilot on the Economic Payment Line (EIP) Phone Line*- The Subcommittee will work on this pilot project in June.

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 met on May 5, 2021. Members discussed the Call Back project. They had an SME from W&I who answered questions and provided feedback. The Agenda for the upcoming month was discussed. Subcommittee 2 is excited to get started on their project.

Outreach

Pam Memmer provided the following Outreach activity:

- April reporting:
 - 100% timely Activity Reports submitted
 - 89.9 participation hours
 - 28.6 Outreach hours
 - 71,777 increase Audience

- The activities reported for April included Andrea Price's radio interview
- Memmer gave an overview of the importance of our Outreach. She went over TAP members roles and responsibilities as noted in the Member Position Description and TAP Handbook:
- Participating in Outreach helps educate and inform the public

Members shared their suggestions on doing Outreach:

- Donna Burris stressed the importance of being mindful of Taxpayers and take advantage of the virtual setting, reach out to sororities, YouTube, marketing more, utilizing the LTAs in speaking
- Memmer added www.irs.gov has YouTube posting
- Price agreed with YouTube and to be professional
- Edelen added utilizing the Newspapers in the local areas for awareness of TAP.
- Pinkney suggested contacting Local Taxpayer Advocates (LTAs).
- Rene Tiongquico stated connecting with the LTAs and local media to make the public aware
- Rice stated utilizing family members, friends, casual contacts to mention TAP would be a good idea
- Memmer add contacting local television stations

Internal Communications Committee (ICC)

Tiongquico attended the monthly meeting. He updated the committee for April:

- Updating the webpage to align with Social Media guidelines
- Shared information from an Outreach activity done by Price from Ohio utilizing the local radio station to get the word out about TAP
- Members were encouraged to submit personal activities conducted to help spread the word about TAP

Action Items

Matherne shared the following Action items:

- Post the approved TFPL April 13, 2021, Meeting Minutes as corrected
- Work with Odom to get an update to **Issue #43632** and the list of 87 IRS toll-free phone lines
- Update the Screening Report items by contacting taxpayers, reassigning and closing issues

Matherne expressed her thanks to the committee members

Roundtable

- Rice shared that he's creating a Facebook page for Texas
- Rice informed members to check the email he forwarded about feedback needed regarding Online Accounts.

English thanked members for their attendance and for the work that they are doing.

Close

English officially closed the meeting at 11:58 AM EDT

**Next Meeting: Tuesday, June 8, 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.