

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

- | | |
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| • 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) |
| • Michael Odom | W&I Operations Support |

Quorum

A quorum was met.

Welcome

Susan Jimerson welcomed everyone to the call and opened the meeting. A overview of the Agenda and the following updates were shared:

- Internal Communications Committee (ICC) will have a monthly meeting on July 21, 2021, beginning at 12:00 PM EDT. This committee reviews the TAP Facebook group to convert to Facebook page, the TAP Newsletter and other administrative communication items

- The Outreach Committee will have their monthly meeting on July 21, 2021, starting at 2:00 PM EDT. National TAP Vice Chair, Nina Tross is the Lead for this committee
- The Joint Committee will have their monthly meeting on July 22, 2021 beginning at 1:30 PM EDT. The meeting will be open to the public

National Office Report

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

- The Military Focus group will meet on July 15, 2021 at 12:00 PM, EDT. Members were encouraged to attend and share any insight they may have on military personnel interacting with the Internal Revenue Service (IRS)
- TAP has been asked to conduct a Homeless Focus group that will meet in August. The exact date and time will be decided and shared with members
- The Tax Forum registration begins this afternoon beginning at 2:00 PM, EDT. The Forums will begin on July 19, 2021. Members were encouraged to visit the www.irs.gov website. There will be thirty live streamed webinars available for credits and members may take advantage of that opportunity. The calendar invite was sent for registration. English will be attending the call today
- The Interview sessions are going well. Appreciation and thanks was expressed to members for their participation and assistance. There are still sessions available. If any member would like to participate, they should contact English. Applicants are being interviewed from all states this year
- The Joint Committee Planning Session will be held the week of August 23, 2021. Invites will be sent to the Chairs and Vice Chairs. The Chairs will gather information from their committees as to any changes or improvements they would like to see
- The National Taxpayer Advocate (NTA) released the June Report. Members were encouraged to read over the Report
- The Child Tax Credit began on July 15, 2021. IRS released a lot of information and members were encouraged to look over the information

Chair Report

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

- The Joint Committee received six referrals: Issue #49524 LT3541 and LT3541A; Issue #43944 LT5071C and LT4883C; Issue #44237 CP504 and CP504B; Issue #48369 Schedule K Forms; Issue #48424 Initial ATM Instructions and Issue #44227 Partnering with VITA
The Joint Committee decided to move forward on all the referrals

- Rice informed members that it is in violation of the TAP Charter for members to send emails to IRS employees. All correspondence must go through Jimerson and Rosalind Matherne
- Members were informed they have been doing a great job in submitting the Activity Reports

Minutes Approval

TFPL Minutes for June 8, 2021 were approved as submitted.

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 #4305 Go Back Options is being reconsidered with a due date of August 1, 2021
- There is one question outstanding regarding the Error Resolution System. The answer is due July 16, 2021

Screening Committee

Andrea Price stated the Screening Committee has been active and met on July 20, 2021. Thank you was expressed to Rosalind Matherne for categorizing the Issues by topics totaling three pages. The Committee screened a total of 22 issues

Member moved and Price seconded the Screening Committee's report be accepted.

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

Subcommittee 1

Ying Sa stated Subcommittee 1 met on July 7, 2021. They discussed the Issue and completed the project assigned by W&I -- Issue #44245 Natural Language Pilot on the Economic Income Payment (EIP) phone line.

- Issue #50542 Where's My Refund Tagline is a new referral issue the Subcommittee is working on. Ying Sa agreed to start drafting this referral.

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 met on July 7, 2021 and on July 12, 2021. The subcommittee members finished Issue #44243 Expansion of Customer Callback (CCB) to Eleven Apps which was assigned by W&I. The members discussed research needing to be done and

- Reviewed Issue #42231 Add 1040 Telephone Number to the 1040 Publication

Outreach

Pamela Memmer shared the following Outreach activity:

- June reporting:
 - 100% Activity Reports submitted
 - 157.3 Participation hours
 - 35.6 Outreach hours
 - 46,733 Audience reachedAppreciation was expressed to the committee members
- The activities reported for June were virtual community Outreach events, blog posts for local publications and professional associations, social media posts, and discussions board activities, discussions with families, and friends, presentations with local organizations. Most are still virtual
- Members were encouraged to continue doing Outreach. This will help educate and inform the public of TAP and will help identify taxpayers' issues
- English complimented the Full Committee on a job well done in getting their Activity Reports in.
- Recognition ideas should be sent to English for being at 100 percent

Internal Communications Committee (ICC)

Rene Tiongquico stated the following:

- A special recognition extended to Memmer for TFPL's Outreach. A blurb on Memmer's Outreach on Social Media was shared
- Memmer and Price were featured in the ICC Newsletter
- Members were encouraged to share any Outreach activities being done
- ICC is anticipating a change from Facebook group to Facebook page pending discussions with IRS. This will be finalized by October 1, 2021
- Matherne requested members to volunteer to do the article for next month's ICC article. Tiongquico stated he would do the article once again.

Action Items

Matherne shared the following Action items:

- Post the approved TFPL June 8, 2021 Meeting Minutes, as corrected
- Follow up with information for Subcommittee 2 that is due by the end of this week

Roundtable

Tiongquico needed clarification on TAP members role in contacting IRS employees. Jimerson explained that in accordance with the TAP Charter, the proper channels are to go through the TAP Staff; Jimerson as the Manager or Rosalind Matherne, the Analyst for this Committee. Any questions will be routed through the proper channels within the IRS.

English added there are 75 TAP members. There is one IRS liaison, Michael Odom who participated on this call. If all members were to contact him directly, he would not be able to complete his other assigned duties. This is a collateral duty for Odom. There is a protocol that TAP must follow per the Federal Advisory Committee Act (FACA) guidelines for TAP.

Close

Jimerson expressed appreciation to everyone who attended the call. The meeting was officially closed at 11:50 PM EDT

**Next Meeting: Tuesday, August 10, 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.