

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 10, 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 |

Staff

- | | |
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| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • 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. An overview of the Agenda and the following updates were shared:

- Internal Communications Committee (ICC) will have a monthly meeting on August 18, 2021, beginning at 12:00 PM EDT. This committee reviews the TAP Facebook presence, the TAP Newsletter and other administrative communication items associated with TAP.
- The Outreach Committee will have their monthly meeting on August 18, 2021, starting at 2:00 PM EDT. The National TAP Vice Chair, Nina Tross is the Lead for this committee

- The Joint Committee (JC) will have their monthly meeting on August 26, 2021 beginning at 1:30 PM EDT. The National TAP Chair, Robert Moretti and TAP Vice Chair Nina Tross will be in attendance along with the Chairs of the other project committees. The JC reviews, among other things, referrals submitted to the Internal Revenue Service (IRS). Members are encouraged to attend
- The Joint Committee Planning Session will be held on August 24-25 2021. Invites have been sent to the Project Committee Chairs. The Chairs will gather information from their committees as to any changes or improvements they would like to see.
- In a combined effort with Treasury and Wage & Investment, Customer Assistance, Relationships and Education (W&I, CARE) organization, the IRS will conduct a usability test on the **2022 IRS Form W-4P, Withholding Certificate for Periodic Pension or Annuity Payments**. Form W-4P is used when the taxpayer has multiple sources of withholding (e.g., multiple pensions, or a job and an annuity). Specifically, they would **like to do some testing on step 2 of the form, and see if subjects find this step causes confusion, and if so, how to make it clearer**. This step is designed to assist taxpayers in arriving at the most accurate withholding where they are completing this form for a periodic retirement payment that they will receive, but also have other income from a job or multiple pensions, which may include a spouse's job or pension(s).
- They are seeking approximately 30 participants from TAP. During the testing, participants will be asked to complete the form using a hypothetical scenario that they will provide. Participants will also be asked for their impressions of the form and about their experience completing the form. Overall, each session will last for approximately 45 minutes from beginning to end. Sessions will be held from August 9th to August 13th. TAP participation is encouraged.

Chair Report

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

- The Joint Committee received six referrals: **Issue #50487** Review Form 8857, **Issue #48596** Form 1040SR, Line 38 "Estimated Tax Penalty", **Issue #48840** Add Worksheet to Fillable Forms, **Issue #49525** Expanded Taxpayer Online Account with the IRS, **Issue #44253** Increase the Number of Forms, Publications and Instructions Allowed to be Ordered and **Issue #49629** CP 161 Notice of Unpaid Taxes. The Joint Committee decided to move forward on all the referrals
- Members were encouraged to do more outreach

Minutes Approval

Joe Edelen moved that the Minutes of July 13, 2021, be approved as submitted. Rene Tiongquico seconded it. The motion was adopted.

Members of the Public

No members of the public are on the call.

Issue #43095 “Go Back” Options Updated Response

Rosalind Matherne congratulated Cynthia Pinkney for developing and writing the referral for Issue #43095 “Go Back” Options which the IRS partially accepted

Pinkney reviewed the details of the updated response by the IRS.

Pinkney moved and Edelen seconded the Response be accepted

Decision: Full Committee Consensus accept the Response as submitted

Program Owner

Michael Odom stated:

- W&I has no open referrals for the TFPL Committee
- There is one question outstanding regarding the Error Resolution System. The answer is due August 24, 2021

Screening Committee

Andrea Price stated the Screening Committee has been active and met on July 20, 201. The Committee screened a total of 22 issues

Edelen moved and Memmer seconded the Screening Committee’s report be accepted.

Decision: Unanimous Consent by Full Committee Consensus accept the Screening Committee Report as submitted

Subcommittee 1

April Smith announced that she’s the new Subcommittee 1 Lead because Ying had to step down. Subcommittee 1 met on August 2, 2021 and everyone was present except for Ying. The Subcommittee members continued to work on **Issue #50542** *Where’s My Refund Tag Line* which is close to being ready to elevate to the Joint Committee. All the members of Subcommittee 1 finished their assignment for **Issue #44245** *Natural Language (NL) Pilot Project for the Economic Impact Payment (EIP) phone line*

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 met on August 3, 2021. The Subcommittee members finished **Issue #44243** *Expansion of Customer Callback (CCB) to 16 Apps on the toll-free telephone line* which was assigned by W&I. Lacy Rice will draft the referral

and submit the draft to the Subcommittee by August 27, 2021. In addition, the Subcommittee is working on two referrals:

- **Issue #50678** *Communicating with 1040 filers and underserved communities who do not have access to www.irs.gov and other electronic materials*
- **Issue #48550** asks IRS to add a Public Service Announcement to Out-of-Scope list on the website

Pinkney, Memmer and Tiongquico are working on updating the two above draft referrals which will be ready for review by the Subcommittee on August 27, 2021.

- Reviewed the Reconsideration for **Issue #42231** *Add 1040 Telephone Number to the 1040 Instructions*

Pinkney moved and Memmer seconded the Response to the Reconsideration be accepted and closed

Decision: Full Committee Consensus accept and close the Response to the Reconsideration as submitted

Outreach

Pamela Memmer shared the following Outreach activity:

- June reporting:
 - 88 % Activity Reports submitted
 - 147.9 Participation hours
 - 13.2 Outreach hours (63% decrease from June's revised total of 35.6 hours)
 - 18,962 Audience reached
 - Appreciation was expressed to the committee members
- The activities reported for July were virtual community Outreach events, blog posts for local publications and professional associations.

Members were encouraged to continue doing Outreach. This will help educate and inform the public of TAP and will help identify taxpayers' issues

Internal Communications Committee (ICC)

Rene Tiongquico stated the following:

- Members were encouraged to share any Outreach activities they've done with him so it can be highlighted in the Newsletter
- He stated he will continue to write the article for the monthly Newsletter and encouraged the Committee members to send him ideas
- There has been no feedback about changes or improvements to the TAPSpace Guide at this time

- ICC is transitioning from a Facebook group to a Facebook page and will be sending a solicitation to the entire TAP to join as members

Action Items

Matherne shared the following Action items:

- Post the approved TFPL July 13, 2021 Meeting Minutes, as corrected
- Follow-up with information for Subcommittee 2 that is due August 24, 2021
- Close the Response

Roundtable

There was discussion about the information the IRS captures and evaluates regarding the toll-free telephone service: calls answered, abandons, etc. and how the data is reviewed and used. Debra Awalt advised the Committee that they received some of this information in the past along with the Customer Satisfaction survey results. Awalt explained that the IRS captures the number of calls answered, has a Level of Service computation, abandons, secondary abandons, records telephone calls for Quality Assurance (QA), and QA reviews are shared with employees. IRS also has what they call the Customer Early Warning System group that meets and discuss any issues that are unusual on the Customer Satisfaction Reports. Guidance is then issued as to how to handle the situations. Awalt also offered to have some from the Joint Operations Committee (JOC) speak to the group on how data is captured.

Close

Jimerson expressed appreciation to everyone who attended the call. The meeting was officially closed at 11:59 PM EDT

**Next Meeting: Tuesday, September 14, 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.