

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, September 14, 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 |
| • Lacy Rice, Jr. | Corpus Christi, TX | Chair |
| • April Smith | Birmingham, AL | Member |
| • Rene Tiongquico | Washington, DC | Member |

Members Absent

- | | | |
|----------------|----------------|--------|
| • Andrea Price | Sylvania, OH | Member |
| • Ying Sa | Des Moines, IA | Member |

Staff

- | | |
|--------------------------|---|
| • 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) |
| • James E. Bellinger, IV | W&I Operations Support |

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the Agenda was provided. Terrie English was unable to be on the call. The following is the National Office and Designated Federal Officer's Report:

- The Recruitment package is in the approval phase and moving forward. The package has gone through the background and compliance checks.
- The Joint Committee's Annual Planning Session was held in August. They had discussions on the 2022 TAP year outlook. Ken Corbin, Chief Taxpayer Experience Officer attended and shared how the IRS is moving

- forward, making improvements to the different processes and systems. He provided insight on some of the challenges IRS is experiencing. He answered questions provided by the Committee Chairs
- TAP's 2022 Chair and Vice Chair elections will be held in mid-October. There will be an information session where the members can obtain more information. Members were encouraged to attend if interested.
 - TAP's 2021 Annual Report Committee will meet soon to review the template. This committee will process the report which describes all the work of the TAP committees which will be available to the public.
 - The last date of the TAP year, November 30, 2021, is quickly approaching. The last Joint Committee meeting will be November 18, 2021. Members were encouraged to continue working on projects.
 - Internal Communications Committee (ICC) will have their monthly meeting on September 15, 2021, beginning at 12:00 PM, EDT
 - The Outreach committee will have their monthly meeting on September 15, 2021 beginning at 2:00 PM, EDT
 - The Joint Committee will have their monthly meeting on September 23, 2021 beginning at 1:30 PM, EDT. This meeting is open to the public

Chair Report

Lacy Rice, Jr. welcomed everyone to the call. He stressed there are only two months remaining in the TAP year. Returning members were encouraged to continue to keep track of all Outreach hours through February 2022.

- The Joint Committee Planning meeting was held on August 24, 2021 and August 25, 2021. Their regular meeting was held on August 26, 2021. The end of the year survey was discussed. During the Joint Committee's regular meeting several items were forwarded to IRS with one tabled:
Issue #48321, Section 218 of the Agreement SSA
Issue #49613, Social Security Benefits Worksheets 5A and 5B
Issue #49976, Classification of Bonus Money
Issue #49996, Form 1099R
Issue #50131, Fillable F941
Issue #48551, Unequal Treatment of International Taxpayers
Issue #48702, Eliminate Third Party Taxpayers
Issue #36435, Penalty Relief Awareness
- On October 13, 2021 there will be an information session for the TAP 2022 Chair and Vice Chair. Members were encouraged to attend if interested.

Minutes Approval

TFPL Minutes for August 10, 2021 were approved as submitted.

Members of the Public

No members of the public were on the call.

Program Owner

James Bellinger, IV stated there were no updates to share. He stated that the TAP Members are appreciated for all the hard work being done

Subcommittee 1

April Smith stated Subcommittee 1 met on September 7, 2021. They are continuing work on

- **Issue #50542**, Where is My Refund Tax Line
- **Issue #44245**, Natural Language Pilot Project

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 met on September 1, 2021.

- **Issue #48550**, Out of Scope Add public service announcement, the referral is ready to be forwarded to the Joint Committee
Pinkney motioned and Joseph Edelen seconded
Decision: Full Committee Consensus to forward Issue #48550 to the Joint Committee for consideration
- Subcommittee 2 will continue to work on their referrals.

Screening Committee

Rosalind Matherne stated there was no report for this month.

Outreach

Pamela Memmer reminded members when submitting their Activity reports to copy the TAP email mailbox. Members were requested to provide additional information regarding the organization or group where the Outreach was completed on their report.

The following Outreach activity was shared:

- August reporting:
 - 100% Activity Reports submitted
 - 122.5 Participation hours
 - 40.4 Outreach hours
 - 13,513 Audience reached
- Outreach events in August included virtual community Outreach events, blog posts for local publications and professional associations and the virtual Tax Forum booth

- Reminder that Outreach is an important part of TAP member responsibilities and to participate in Outreach Activities
- The end of TAP year 2021 is approaching, members were encouraged to continue Outreach efforts
- The Outreach Committee will have their monthly meeting on September 15, 2021 beginning at 2:00 PM, EDT
- Anyone with comments, concerns or questions were encouraged to reach out to Memmer, Matherne or Jimerson
- Rice added to reach out to student campuses and share information in allowable venues

Internal Communications Committee (ICC)

Rene Tiongquico stated the following:

- Migration has been completed from TAP Facebook group to TAP Facebook page. Volunteers are needed to be Facebook Administrators. Members interested were encouraged to contact Tiongquico
- Volunteers are needed to complete the articles for the September Newsletter
- Members who have completed any Outreach activities were encouraged to share the information with Tiongquico
- ICC is making awareness of TAP member interactions on www.TAPSpace.org
- Rice added that promoting the Facebook page would be a part of Outreach. Members were encouraged to create a Facebook page for their individual States

Action Items

Matherne shared the following Action items:

- Post the approved TFPL August 10, 2021 Meeting Minutes
- Elevate **Issue #48550** to the Joint Committee

Roundtable

- Tiongquico added ICC is exploring the possibility of creating an Instagram account. Members' input is welcomed. Rice added IRS has a large online presence that could help with Outreach.
- Jimerson stated she and Matthew O'Sullivan added a link for the National Taxpayer Advocate's Blog in the September Newsletter. The latest National Taxpayer Advocate's Blog was posted on TAPSpace concerning

the challenges TAS is going through. Members were encouraged to read over the post for helpful information going forward with referrals

Close

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

**Next Meeting: Tuesday, October 12, 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.