



**Toll Free Phone Lines Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, May 13, 2020**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Attendance

- Richard Brouillard Waterloo, WI Member
- Joseph Edelen Vermillion, SD Member
- Terrill Flakes Waynesboro, GA Member
- Thomas Kerr Amherst, NY Member
- Phillip Kleiber Roswell, GA Member
- Cynthia Pinkney Tyler, TX Member
- Andrea Price Sylvania, OH Chair
- Lacy Rice, Jr. Radcliff, Ky Vice Chair

Absent

- Bernard Peterson Cazenovia, NY Member

Staff

- Terrie English TAP Director
- Sheila Andrews Executive Director, CSO:TAP
- Rosalind Matherne Program Analyst
- Robert Rosalia Program Analyst
- Tamikio Bohler Wage & Investment
- Michael Odem Wage & Investment
- Annie Gold Administrative Assistant

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. The following upcoming meetings were shared:

- The Joint Committee monthly meeting is scheduled for 1:30 pm EST on May 28, 2020. The meeting is open to the public.
- The Internal Communications Committee monthly meeting is scheduled for 3:00 pm EST on May 26, 2020. They will work on the monthly Newsletter, and other projects as well as social media platforms (e.g., FaceBook, etc.).



- The Outreach Committee meeting will be held on May 21, 2020 and the Lead is TAP Vice Chair, Robert Moretti
- The Interview phase for Recruitment will begin at the end of the May. Lisa Billups will send an email solicitation for volunteers to participate in the interview process

Jimerson gave an overview of the Agenda.

National Office Report

Terrie English welcomed everyone to the call. Sheila Andrews, Deputy Director CSO expressed her appreciation to the Full Committee and for all the work being done. English shared the following:

- Updated information is being provided daily on www.IRS.gov website
- Members were reminded to let taxpayers know they can go onto the website to update their information if they are wanting to receive Direct Deposits on the Stimulus checks. IRS has employees going into the campus offices to mail paper checks. The majority of IRS offices are closed
- Next month Virtual meetings will be up and running for training purposes. The training will benefit new members to help identify training needs and ensure members are getting what they need to be successful in TAP. Some suggestions have been received on types of training needed. The date for the training will be shared with everyone.

Chair Report

Andrea Price expressed gratitude to members who stepped up in leadership roles. Members were reminded to inform the Chair and Analysts if they will not be able to attend meetings.

Minutes Approval

The following Minutes were approved as submitted:

- March 26, 2020
- March 27, 2020
- April 8, 2020

Public Comments

- None

Screening Report

Thomas Kerr stated there are 18 Issues on the Screening Report. The Parking Lot Issues:

- **40561**, Add voice recognition associated with Issue 39947

- **41024**, Fax number for Taxpayer Assistance, Transfer to Communications Committee
- **41249**, Involves Taxpayer phone number on website. Drop
- **41399**, Involves two issues on Tax Practitioner's line. Individual issue and will contact submitter. Drop

Parking Lot Issues

- **41423**, **41424** and **41426**, Issues involved with the Tax Practitioner Toll Free Line. Recommend combine all three issues
Parking Lot for further research
- **41712**, this is an individual issue
- **41741**, this is an individual issue, the Analyst will contact the submitter. Drop
- There are six additional Issues the Screening Committee did not get to review.
More information to be shared during next month's meeting

Decision: Full Committee Consensus accept the Screening Report as submitted

Subcommittees Report

Subcommittee 1

Terrill Flakes stated Subcommittee 1 had been working Issue **40558** - PSA for Improveirs.org on Toll-Free Phone Lines for reconsideration. Lacy Rice wrote the reconsideration to include information needed for the Public Service Announcement on www.ImproveIRS.org. An added announcement will be heard while waiting on the toll-free phone line. Recommend this issue be elevated. Some of the added highlights include:

- Added background information
- Referenced Taxpayers Bill of Rights
- Highlights on IRS and Taxpayers benefits
- Taxpayer Bill of Rights: Right to Quality Service
- Posting on www.IRS.gov

Action: The reconsideration will be forwarded to Bohler and Michael Odem.

Decision: Full Committee Consensus Accept Subcommittee 1 motion to elevate Issue 40558

Subcommittee 2

Thomas Kerr stated Subcommittee 2 is continuing work on Issues

- **40707**, Lower Cost and Improve Access for International Taxpayers. The Subcommittee had a lengthy discussion with Laura Snyder on taxpayers living aboard and the services available when taxpayers try to reach IRS. The Committee decided to do more research and requested a SME attend the next meeting.

- **40124**, Taxpayers Being Disconnected from the System the Subcommittee 2 discussed the issue with the SME and different roll-out of programs. This issue will be placed on hold until response is received from the IRS by October 2020

Outreach

Lacy Rice stated:

- Members with the Outreach sheet containing row 28 were notified it is the wrong sheet. Contact Rice or Rosalind Matherne for the correct copy
- March to April there were a total of 19.1 hours and total Outreach of 37,317 people
- Members were encouraged to do some type of Outreach
- Price shared tips on doing Outreach during last month's meeting and members were encouraged by them
- Kerr was asked to share for April and each month there will be a member asked to share their Outreach experiences
- Members were reminded that activity reports are due by the 25th of each month and copies should be emailed to Rice, Matherne, Price in addition to a copy sent to the Taxpayer Advocacy Panel mailbox
- Any activity relative to TAP is to be placed on the Activity Report. Contact Rice if there are any questions on completing the reports
- Jimerson reminded members to reach out to their LTAs and if they have not heard back from the LTA let management know
- English added there will be a roll out of information within the next couple of months on how Problem Solving will be handled. Information will be shared with members once finalized and is available

Roundtable

- Rice suggested members reach out to other Committee members within their states for possible Outreach Activities they may be doing
- Price shared ideas on different Outreach Activities she has participated in that could help members in completing their Outreach

Internal Communications Committee

Price stated ICC met on April 28, 2020.

- Joseph Edelen and Cynthia Pinkney agreed to represent ICC
- Pinkney will no longer be available to continue with ICC. A volunteer is needed to be placed in her position. She will remain on the Full Committee
- Laura Brook was elected Chair and Nina Tross as Vice Chair
- Newsletter articles are due the 25th of each month



Action Items

Matherne stated she will

- Update SAMS with Screening Committee's report
- Continue with research on Issue 40707
- Elevate Issue 40558 to IRS for Reconsideration
- Contact SME regarding International calls

Close

Jimerson thanked everyone and officially closed the meeting.

**Next Meeting: Wednesday, June 10, 2020,
11:00 AM EDT, 10:00 AM CDT, 9:00 AM MDT, 12:00 PM PDT**