



**Toll Free Phone Line Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 8, 2020**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Members Present

- | | | |
|----------------------|----------------|------------|
| • 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 |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Terrie English | TAP Director |
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Debra Awalt | Wage & Investment |
| • Tamikio Bohler | Wage & Investment |
| • Cindy Jones | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Members Absent

None

Quorum

Met

Welcome

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

- Outreach monthly meeting is scheduled for April 9, 2020 beginning at 1:00 pm EST. The meeting is lead by the TAP Vice Chair and attended by each committee's Vice Chair.
- Joint Committee monthly meeting is scheduled for April 23, 2020 beginning at 1:30 pm EST. The call information has been posted on

www.TAPSpace.org for members who would like to attend. The meeting is attended by the TAP Chair and Vice Chair along with all the Chairs of each committee. It is open to the public.



- Internal Communications Committee has not scheduled a date or time for their meeting. Information will be shared once they have met and scheduled the meeting. The committee will focus on internal and external work.

Jimerson encouraged to search information on www.irs.gov for the most current information on COVID-19 and any questions on the Stimulus Package. She gave an overview of the Agenda for today's meeting.

National Office Report

Terrie English welcomed everyone to the call. The following information was shared:

- Information is being provided daily on the COVID-19 issue. It is difficult getting calls through because a lot of the IRS offices are closed. The systems are overloaded. There is work being done to increase the space.
- Erin Collins, New National Taxpayer Advocate is having meetings with her immediate staff. There is a meeting scheduled for Thursday, April 9, 2020 with the complete staff. English anticipates direction on TAP operations will be provided. Information will be shared with members.

Chair Report

Andrea Price thanked everyone for being on the call.

Public Comments

None

Minutes Approval

March 2020 minutes will be approved during next month's meeting.

Subcommittees Report

Subcommittee 1

Terrill Flakes stated Subcommittee 1 met and discussed

Issue 40558, Having A Public Service Announcement When Taxpayers are on Hold. Lacy Rice will be writing up the rebuttal by April 11, 2020 for review. Information was shared with Rosalind Matherne on April 06, 2020. The Subcommittee did not agree with the response they received from IRS. They will be submitting the rebuttal.

Subcommittee 2

Thomas Kerr stated Subcommittee 2 is working on the following:

- **Issue 40707 -- Lower Cost and Improve Access for International Taxpayers** has five different parts: **1627, 1628, 1629, 1630 and 1631 on Using the Toll-Free System.**
- **Issue 40124, Taxpayers Being Disconnected from the System** the Subcommittee 2 has questions to put forward from focus groups to implement changes
- They will proceed cautiously because there is stress on IRS due to the COVID-19 and Stimulus order. A SME is requested for questions during their next meeting.

Outreach

Lacy Rice stated it was shared during the Face to Face meeting

- Send the Outreach Reports to Matherne and then a copy to him
- Correctly input the title with the year, committee name and subject on the report
- Returning members were advised in December 2019 to continue Outreach activities
- Price has been doing a great job with Outreach. Price was asked to speak during next month's meeting on some of the Outreach Activities she has been involved with.
- Rice will ask one member each month to share their Outreach experiences
- Social Media was a shared example of doing virtual Outreach to promote TAP application season. Members were encouraged to utilize Facebook for this purpose.

Rice shared two issues they are having with the Outreach Reports:

- Cumulative hours are not correct at the top of the report. There are two lines and one of the lines will need to be deleted.
- In the drop-down column members were advised not to add additional information. Once scrolling through the choices, if the choices provided within the column does not list what is needed, members should contact Matherne and Rice know.

Cedric Jeans TAP East Manager forwarded a copy of the Guide for Activity Reports to each member. Matherne will resend the Guide to the full Committee. Members were advised to contact Matherne with any issues.

Rice stated the following to stress the importance:

- Follow the Guide to help prevent problems
- Input and no correlation, let Matherne and Rice know
- Do not make any changes to the Report itself
- A total of four Activity Reports were received for the month
- Contact will be made to members for any issues in getting the reports completed and turned in
- The Excel spreadsheet will be reviewed to correct the numbers from being doubled. The formula will be correct.
- Copies of all Activity Reports goes to Rosalind Matherne, Lacy Rice and to the TAP mailbox

Roundtable

- Price thanked members who served on the committees with a special appreciation to Joseph Edelen and Cynthia Pinkney
- Matherne and Price working to assist in scheduling the Screening Committee. The meetings will be done on an Ad Hoc basis and will be shared with committee members
- Phillip Kleiber inquired on the status of the 1040 Line. Debby Awalt responded the line is down and they have not been advised as to when it



will resume. Members advised to search www.IRS.gov for the best source of updated information

Action Items

Matherne stated she will

- Update information on Issue 40558, Public Service Announcement, Subcommittee 1 working on the reconsideration. Rice will write it up
- Issues 40707 and 40124 request SME for next meeting
- Work with Rice on updating all Activity Reports
- Send copy of the Activity Report Master Guide to members
- Send the Joint Committee Meeting's call in information to members

The TAP Member Handbook is with the Publisher and the Annual Report is being printed. Copies will be shared with members as soon as TAP Staff is able to get back into the office. English added the copies will be delivered to the National Office at that time Kevin Brown will be sending out to each member. Members were encouraged to go online to view updates.

Tamikio Bohler added members should be aware of updates on www.IRS.gov on

- Peoples First Initiative
- OIC Steps for Taxpayers
- OIC payments suspended
- Interest continuation on unpaid balances

Close

Jimerson thanked everyone and officially closed the meeting.

**Next Meeting: Wednesday, May 13, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 12:00 p.m. PT**

These minutes have been approved and certified by the committee chairperson.