



**Toll Free Phone Lines Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, October 14, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- | | | |
|-----------------------|----------------|------------|
| • Donna Burris | New York, NY | Member |
| • Joseph "Joe" Edelen | Vermillion, SD | Member |
| • Terrill Flakes | Waynesboro, GA | Member |
| • Phillip Kleiber | Roswell, GA | Member |
| • Bernard Peterson | Cazenovia, NY | Member |
| • Cynthia Pinkney | Tyler, TX | Member |
| • Andrea Price | Sylvania, OH | Chair |
| • Lacy Rice, Jr. | Radcliff, Ky | Vice Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Rosalind Matherne | Program Analyst |
| • Robert Rosalia | Program Analyst |
| • Michael Odom | Wage & Investment |
| • Debby Awalt | Wage & Investment |
| • Dale Hawkins | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Quorum

Quorum was met

Welcome

Susan Jimerson welcomed everyone to the call. TAP Director, Terrie English was not able to attend the call. The following upcoming meetings were shared:

- The Outreach Committee meeting is scheduled for October 15, 2020 beginning at 12:00 pm, EDT. This committee is led by the TAP Vice Chair, Robert Moretti and attended by the Vice Chairs of the Project Committees
- The first draft of the Chair Report for the Annual Report is due to be turned in to Gilbert Martinez on October 16, 2020. Martinez is the Joint Committee Analyst and the analyst in charge of the 2020 Annual Report
- There will be an informational session explaining what it is like to be a TAP Chair or Vice Chair scheduled for October 20, 2020 at 3:00 pm, EDT

- Following the format of events for the upcoming TAP Chair and Vice Chair Election process, nomination or self-nominations are due on October 25, 2020 by 12:00 am, EDT. Members were encouraged to submit their interest by midnight on October 25, 2020
- Campaign statements are due October 30, 2020 by midnight and will be posted onto www.TAPSpace.org by November 02, 2020
- There will be a meet the candidates session held on November 05, 2020 at 3:00 pm, EDT and voting ballots will be sent to members by November 06, 2020.
- Votes are due to be turned in on November 13, 2020 by midnight. Results will be shared on November 17, 2020
- There will be a mentorship program on October 21, 2020 at 3:00 pm, EDT. Calendar invites have been sent to members that have expressed interest
- Joint Committee monthly meeting will be held on October 22, 2020 beginning at 1:30 pm, EDT. TAP Chairs and Vice Chairs, Chairs from each project committee and Internal Communications committee will attend this meeting. Members were encouraged to join in on the call
- Internal Communications Committee (ICC) meeting is scheduled for October 27, 2020 beginning at 3:00 pm, EDT.

IRS has added a QR Code on www.IRS.gov website to assist Taxpayers when looking for options on paying balances owed and Installment Agreements. Currently the QR Code is being used on the CP14 and CP14A notices. The Online 2021 Tax Forums information is available for viewing.

Jimerson shared a review of the Agenda for today's meeting.

Chair Report

Andrea Price welcomed everyone to the call. There is one meeting remaining for the Toll-Free Phone Lines (TFPL) Committee in this TAP year. Thank you was expressed to Bernard Peterson and Cynthia Pinkney for submitting the Subcommittee work for the 2020 year. Price stated:

- The Joint Committee had their meeting on September 24, 2020
- Five Committees had referrals for approval submitted to the Joint Committee: TFP submitted one, NCC submitted three, TCC had three referrals; one relating to Where Is My Refund, Simplify IRS calendar due date for different entities and the third was to supply Taxpayers with the ability to get a written payoff by year and Tax forum
- TFPL had two referrals, both of which were approved by the Joint Committee
- Special Projects Committee submitted one referral for approval

Minutes Approval

September 8, 2020 TFPL Minutes were approved as submitted.
Joe Edelen motioned and Phillip Kleiber second approval of September 8, 2020 minutes. Edelen requested his name be addressed as “Joe”.

Public Comments

None

Screening Report

Price stated on the September 21, 2020 Screening Report there were three items. Two of the items were dropped and the third item was being worked by Peterson and his Subcommittee relating to the Toll-Free Phone Line language in English and Spanish.

Edelen motioned and Peterson second to accept the Screening Report from September 21, 2020

Decision: Full Committee Consensus approve Screening Report

Issue #40124, Taxpayer’s Contact Information if Disconnected from Customer Service Representative The recommendation submitted was to have the customer service representative ask Taxpayers permission for a call back number if disconnected. IRS issued a response rejecting the recommendation. It was updated on September 29, 2020 showing IRS response.

Debra Awalt explained the difference in the call-back queue that holds the callers place in line and disconnect calls options. Staffing is not adequate to handle the volume of callbacks.

Jimerson informed the Committee, when IRS issues a response and they are not adopting the recommendation, the Committee has the option to submit a rebuttal. When completing a rebuttal, new facts would need to be added that were not previously included in the rebuttal before resubmitting it back to the IRS. It does not mean the IRS will change their decision. It does mean that would be the end of the process for that specific referral.

Kleiber made the motioned and Edelen second to drop Issue #40124

Decision: Full Committee Consensus accept IRS response and drop Issue #40124

Subcommittees Report

Subcommittee 1

Bernard Peterson stated Subcommittee 1 met twice this month. They have been working two Issues:

- **Issue #43221, IRS telephone numbers should be listed in the 1040 Instructions** Subcommittee 1 is working to complete the referral and anticipates having it ready for the Full Committee review during next month’s meeting

- **Issue #43632, Reposition Foreign Language Prompts on 1040 Toll Free Line** Subcommittee 1 recommendation is to forward this Issue to the Joint Committee for consideration

Peterson motioned and Edelen second to move Issue #43632 to the Joint Committee

Decision: Full Committee Consensus to forward Issue #43632 to the Joint Committee for consideration

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 completed the referral for Issue **Issue #41899, IRS Navigation Guide and IRS Phone number Link** a proposal to add a navigation line for individual tax phone line on www.IRS.gov to include adding the IRS phone number link to the home page. Their recommendation is to forward to the Joint Committee.

Pinkney motioned and Lacy Rice second to move Issue #41899 to the Joint Committee pending Systemic Advocacy feedback

Decision: Full Committee Consensus to forward Issue #41899 to the Joint Committee pending SA feedback

Outreach

Rice stated the Outreach Committee met on September 17, 2020. During the meeting it was noted the ending of the TAP year was approaching.

- Members were encouraged to use the Outreach Toolbox because it is a valuable resource
- Rice stressed the importance to participate in some form of Outreach activity. Family and friends can be utilized and help with total Outreach hours
- A question arose during the meeting on the Presidential Awards hours. Members receive an award at the end of their third-year term based upon the number of hours reported. Members were encouraged to reach out to Rosalind Matherne to obtain their total hours
- For the month of September, the Outreach Activity reports were at 100%

- Rice will forward a copy of the Outreach Report to members later today after he has totaled the hours

Internal Communications Committee (ICC)

Edelen stated the ICC met on September 22, 2020. Several issues were discussed during their meeting.

- Laurie Brock talked about the Annual Report during her Chair Report. A draft copy of the Annual Report was submitted by Laurie
- There was a discussion regarding the www.TAPSpace.org redesign
- The TAP member checklist was also discussed

Roundtable

- Kleiber recognized Peterson and Pinkney for their work as Subcommittee Chairs and pushing referrals through. He informed the Committee of an incident with the Toll-Free Practitioners' telephone line. Matherne was able to involve the JOC to make them aware of the issue and will report back to the Committee with any update.

Action Items

Rosalind Matherne stated she will:

- Post September 8, 2020 approved Minutes onto www.TAPSpace.org
- Drop **Issue #43428, Staffing and Wait Times** and **#Issue 43608, Spam Call**
- Associate **Issue #43648, 1040 toll free line - languages other than English** with **Issue #43632, Reposition Foreign Language Prompts on 1040 Toll Free Line**
- Drop **Issue #40124, Taxpayer's Contact Information if Disconnected from Customer Service Representative**
- Forward **Issues #43632, Reposition Foreign Language Prompts on 1040 Toll Free Line** and **Issue #41899, IRS Navigation Guide and IRS Phone number Link** to the Joint Committee pending SA and Attorney Advisory review and approval

Jimerson thanked members for the good work being done despite all the challenges this year. Matherne will follow-up with each member with the total number of TAP hours reported.

Close

Jimerson officially closed the meeting.

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

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