



**Toll Free Phone Lines Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, September 9, 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          |
| • Michael Odom      | 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. A review of the Agenda was shared. The following upcoming meetings were shared:

- The Annual Report Committee will meet on September 11, 2020.  
Jimerson will provide the time for this meeting
- The Outreach Committee meeting will meet on September 17, 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.
- Internal Communications Committee (ICC) will meet on September 22, 2020 beginning at 3:00 pm, EDT. Discussions will be held on various communications items such as the Newsletter, Facebook and other media items.

- The Joint Committee monthly meeting will be held on September 24, 2020 beginning at 1:30 pm, EDT. This meeting is open to the public and led by TAP Chair, Phil Kleiber.

### **Chair Report**

Andrea Price welcomed everyone to the call. She attended both Subcommittee meetings. Appreciation expressed to the DFO for allowing the meeting to go past the allotted time.

- There are two more meetings remaining for TAP year ending on November 30, 2020
- The Joint Committee's Planning Sessions were held on August 25, 2020 and August 26, 2020. Each session was held for two hours. Thank you to Joseph Edelen for attending.

Comments regarding how the year is going:

- More time to be able to work and collaborate on issues and do the research
- Improve the mentoring process
- Revisit the interview process/questions asked to potential TAP members details of the time commitment along with the calendar of meetings. Consider replacing members faster if they cannot commit to responsibility.
- Committees should maintain a list of referrals previous sent to IRS
- Unbalanced workload
- How to strategically solve issues instead of one-by-one
- Automate the activity report process
- Reset expectations for virtual outreach activities
- Onboarding committee to educate new members
- Understand why some committees take longer to produce referrals
- Face to face meetings are critically important
- Video portion of WebEx not able to be utilized to see each other during committee meetings.

Election Planning for TAP Chair and Vice Chair positions:

- October 20, 2020 Role of the TAP Chair or Vice-Chair
- October 26, 2020 Nominations due by 12:00 am, EDT
- October 30, 2020 Campaign letters are due by 12:00 am, EDT
- November 5, 2020 Meet the Candidates session
- November 13, 2020 Ballots sent to members
- November 13, 2020 Voting/completed ballots due by 12:00 am, EDT
- November 17, 2020 Results announced

#### TAP Member Survey Results:

- Cedric Jeans stated that the purpose of the TAP annual survey is how TAP can improve
- Overall satisfaction declined from 2018 to 2019. The government shutdown and late start to the TAP year may have played a big part
- Outreach training is an area of opportunity to be improved: Establishing relationship with LTA; Gathering sources from prior members; Improving [www.TAPSpace.org](http://www.TAPSpace.org) and utilizing the Outreach Toolkit
- More training for mentors and pairing at the Face-to-Face meetings to enhance the relationships
- The Joint Committee met on August 27, 2020. Appreciation was expressed to Donna Burris for attending
- Tax Forms and Publications Committee submitted 4-5 referrals for approval from tax practitioners
- Notices and Correspondence committee submitted 1 referral for approval (improve notice language in CP515). A request from Office of Tax Correspondence CP notices
- Taxpayer Communication submitted 1 referral on how to communicate better with military taxpayers
- The other three committees did not submit referrals

#### Other items discussed:

- Approval of TAP's new logo
- Approval of TAP's bylaws
- It is time to draft the 2020 TAP Annual Report. An annual report committee has been set up to provide quality reviews for each committee's Chair report. Bernard Peterson and Cynthia Pinkney have agreed to send Price their respective subcommittee information by October 1, 2020

#### **Minutes Approval**

August 12, 2020 Toll Free Phone Lines (TFPL) Minutes were approved as submitted.

#### **Public Comments**

None

#### **Screening Report**

Price stated a copy of the Screening Report was submitted with the pre-reads for today's call. The Screening Committee met in August. Five of the issues were

dropped. Seven active issues are opened and assigned to the Subcommittees. One was placed in the Parking Lot - **Issue #43094 Add Wait time to be on Hold Clock to IRS.Gov**, a proposal to add a real time wait time chart on [www.IRS.gov](http://www.IRS.gov)

**Edelen motioned and Bernard Peterson seconded**  
**Decision: Full Committee Consensus approve Screening Report**

### **Subcommittees Report**

#### **Subcommittee 1**

Bernard Peterson stated Subcommittee 1 had their meeting on September 3, 2020. They discussed the following:

- **Issue #43430 Delayed Returns for 2019** Taxpayer filed a return and an amended return and did not receive status of return. Recommended issue be dropped
- **Issue #43595 Taxpayers Should be Able to leave Callback**  
Subcommittee 1 recommended issue be dropped.

**Peterson motioned and Lacy Rice seconded**  
**Decision: Full Committee consensus to drop issues #43430 and #43595**

Subcommittee 1 is working the following issues:

- **Issue #42231 IRS 1040 Telephone Number in the 1040 Instructions**
- **Issue #43632 Reposition 1040 Telephone Prompts**
- **Issue #41110 Taxpayer Survey Data Reports**

#### **Subcommittee 2**

Cynthia Pinkney stated Subcommittee 2 referred two issues to Systemic Advocacy and the Attorney Advisor. They recommend both issues be forwarded to the Joint Committee.

- **Issue #43095 Revamp 1040 Prompt Structure** which is a referral to add a go back feature to the Toll-Free phone line
- **Issue #43463 Area Code Added to Voice Response Unit (VRU)** which is a referral to update the Toll-Free phone line based on the normal hours of business for the area code from which the taxpayer is calling from.

**Pinkney motioned and Lacy Rice seconded**  
**Decision: Full Committee consensus to forward Issues #43095 and #43463 to the Joint Committee pending Systemic Advocacy and Attorney Advisor review**

Subcommittee 2 is currently working on the following:

- **Issue #41899 IRS Navigation Guide and IRS Phone Number Link** which is a referral to add a navigation guide to include adding the IRS phone number link to the home page on [www.IRS.gov](http://www.IRS.gov)

The following issue was placed in the Parking Lot:

- **Issue #43501 Out-of-Scope Topics** which is a proposal to reposition the Out-of-Scope Topics list on [www.IRS.gov](http://www.IRS.gov)

**Pinkney motioned and Phillip Kleiber seconded  
Decision: Full Committee consensus to place Issues #43501 and #43094 in the Parking Lot**

### **Outreach**

Lacy Rice informed members the Toolbox is ready for use. It has been approved by the Outreach Chair and DFO.

- A reminder to members that the Activity Reports are due by the 25th of each month
- 100 percent accountability for this month
- 9.2 Outreach hours
- 101,571 people reached
- 134.5 overall activity hours
- Encouragement to members to do virtual outreach by the end of the TAP year
- Donna Burris shared her Outreach activity for the month.

### **Internal Communications Committee (ICC)**

Joseph Edelen stated ICC met on August 25, 2020 and shared the following:

- Members were encouraged to read the Newsletter to find out what other Project Committees are doing
- Partnering with the Outreach committee was discussed as one of the 2021 projects

### **Roundtable**

- Kleiber stated the Onboarding Committee had one call with Terrie English and the team will meet in November or December to work on an upgraded tool in addition to WebEx in 2021. Members were encouraged to consider being a part of the Onboarding Committee
- **SA- Systemic Advisor (Systemic Advocacy)** a unit within TAS. They work on the Annual Report and complete research, advocacy issues, review referrals

- **AA- Attorney Advisor (Attorney Advisory)** work on any legal or procedural issues relative to the National Taxpayer Advocate Report to Congress

### **Action Items**

Rosalind Matherne stated she will:

- Update SAMS to show dropped Issues #43430 and #43595
- Send Issue #41110 Survey narratives to members
- Will share responses from SA and AA on Issues #43095 and #43463
- Place Issues #43501 and #43094 in the Parking Lot

Jimerson thanked members for attending the call. If any questions or comments need to be addressed, members should reach out to Jimerson or Matherne. Members were encouraged to stay safe.

### **Close**

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, October 14, 2020,  
11:00 AM EDT, 10:00 AM CDT, 9:00 AM MDT, 12:00 PM PDT**

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