

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, June 8, 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 |
| • Andrea Price | Sylvania, OH | Member |
| • Lacy Rice, Jr. | Corpus Christi, TX | Chair |
| • Ying Sa | Des Moines, IA | Member |
| • April Smith | Birmingham, AL | Member |
| • Rene Tiongquico | Washington, DC | Member |
| • John Yoon | Carlsbad, CA | Member |

Staff

- | | |
|---------------------|--|
| • Terrie English | TAP Director |
| • 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) |
| • Michael Odom | W&I Operations Support |

Quorum

A quorum was met.

Welcome

Susan Jimerson welcomed everyone to the call and opened the meeting. She provided an overview of the Agenda. The following updates were shared:

- Internal Communications Committee will have a monthly meeting on June 16, 2021, beginning at 12:00 PM EDT. This committee reviews the TAP Facebook page, the TAP Newsletter and other communication methods to promote TAP
- The Outreach Committee will have their monthly meeting on June 16, 2021, starting at 2:00 PM EDT.

- All TAP Member Quarterly meeting will be held on June 17, 2021. This is an Administrative meeting and is not open to the public
- The Joint Committee will have their monthly meeting on June 24, 2021 beginning at 1:30 PM EDT

National Office Report

Terrie English thanked everyone for being on the call. She shared the following information:

- TAP's Recruitment Open Season is now closed. Members will receive an email asking to assist with the interview process. TAP Analysts will be the lead in the process.
- TAP Quarterly meeting on June 17, 2021 will have Kenneth Corbin, Commissioner W&I Division speak and be available to answer questions
- Joint Committee will have their monthly meeting on June 24, 2021 beginning at 1:30 PM EDT
- Information for the next focus group meeting will be shared with members. English will facilitate the call. The next meeting will be the Military Focus Group.

Chair Report

Lacy Rice, Jr. welcomed everyone to the call and shared the following updates:

- He attended both Subcommittee meetings
- The Joint Committee received six referrals: IRS Instruction Where to File Taxes; Online Tax Systems for Taxpayers Abroad; Impossible to Get ITIN; 2019 F1099 Dividends; PPP Loan Forgiveness; LT3541 and LT3541A
The Joint Committee decided to move forward on all the referrals
- Members are doing a great job

Minutes Approval

Joe Edelen moved that TFPL Minutes for May 11, 2021, be approved with correction. Pamela Memmer seconded it. The motion was adopted.

Members of the Public

No members of the public are on the call.

Program Owner

Michael Odom stated:

- W&I has no open referrals for the TFPL Committee
- **Issue #43095** *Go Back Options* is under consideration with a follow-up date of August 1, 2021
- There are no implementation issues pending
- Any questions Odom is available to answer

Screening Committee

Andrea Price stated the Screening Committee met on May 18, 2021. The Committee screened a total of 46 issues:

Price moved and Edelen seconded the Screening Committee's report be accepted.

Decision: Full Committee Consensus accept the Screening Committee Report as submitted

Subcommittee 1

Ying Sa stated Subcommittee 1 met on June 1, 2021 and provided the following updates:

- Discussions were held during the meeting on the Natural Language issue. The Subcommittee developed a plan to work the Excel spreadsheet provided by W&I
- **Issue #43632**, *Reposition 1040 Telephone Prompts*; Reposition Foreign Language Prompts on 1040 Toll Free Line. Subcommittee 1 agreed to close this Issue

Sa moved and Edelen seconded to close **Issue #43632**

Decision: Full Committee Consensus to close Issue #43632

Subcommittee 2

Cynthia Pinkney stated Subcommittee 2 met on June 2, 2021. They discussed the following:

- **Issue #48550** *Out of Scope Out of Scope PSA to the VRU*
The Subcommittee will continue discussing this issue at their next meeting.
- The Call Back project completion is expected by July 7, 2021 and will report out during next month's meeting

Outreach

Pamela Memmer provided the following Outreach activity:

- May reporting:
90% Activity Reports submitted
107.6 Participation hours
17.7 Outreach hours
51,204 Audience reached
Members appreciation was expressed
- The activities reported for May were virtual community Outreach events, blog posts and local publications, social media, and discussions with co-workers, families, and friends

- Members were encouraged to add names of organizations for continual Outreach
- All discussions about TAP is considered Outreach and should be reported
- Memmer stressed the importance of getting the Activity reports completed and turned in by the 25th of each month

Internal Communications Committee (ICC)

Rene Tiongquico stated the following updates for ICC:

- Members were encouraged to submit suggestions for TAP's newsletter
- Andrea Price article described the Outreach she conducted in Toledo, OH
- Tiongquico will do the article write-up for next month's newsletter

Action Items

Matherne shared the following Action items:

- Post the approved TFPL May 11, 2021 Meeting Minutes, as corrected
- Research and contact individuals per the Screening Report
- Update SAMS

Roundtable

English congratulated Edelen on his wedding anniversary and thanked members for their attendance and for the work being done.

Close

English officially closed the meeting at 12:00 PM EDT

**Next Meeting: Tuesday, July 13, 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.