

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 12, 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 |
| • Andrea Price | Sylvania, OH | Member |
| • Lacy Rice, Jr. | Radcliff, KY | Chair |
| • Ying Sa | Des Moines, IA | Member |
| • Rene Tionguico | Washington, DC | Member |

Members Absent

- | | | |
|-------------------|----------------|--------|
| • Cynthia Pinkney | Tyler, TX | Member |
| • April Smith | Birmingham, AL | Member |

Members of the Public

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| • Jennifer Beacon | Wisconsin |
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Staff

- | | |
|--------------------------|--|
| • 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) |
| • James E. Bellinger, IV | W&I Operations Support |
| • Tamikio Bohler | W&I Operations Support |
| • Cindy Jones | W&I Operations Support |

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the Agenda was provided. The following Designated Federal Officer's Report was shared:

- TAP 2022 Chair and Vice Chair elections will be held in mid-October. An information session explaining the roles of the National TAP Chair and Vice Chair has been scheduled for October 13, 2021 beginning at 3:00 PM, EDT. Members interested in the positions were encouraged to attend
- TAP 2021 Annual Report Committee has begun work on the Annual Report and will schedule their meeting by the end of the month. Gilbert Martinez is the Joint Committee Analyst leading this committee
- November 30, 2021 will be the last date of the 2021 TAP year and it is rapidly approaching. Committees are working to complete referrals and forward to the Joint Committee for their meeting on November 18, 2021
- Internal Communications Committee (ICC) will have their monthly meeting on October 20, 2021, beginning at 12:00 PM, EDT. They will be looking at the redesign of the Annual Report
- The Outreach Committee will have their meeting on October 20, 2021 beginning at 2:00 PM, EDT
- The Joint Committee's next scheduled meeting will be October 28, 2021 beginning at 1:30 PM. The meeting is open to the public. Members were encouraged to attend

National Office Report

Terrie English stated a meeting will be held next week to finalize dates for upcoming meetings.

- The Graduation ceremony will be scheduled for the members who have served three years and will be graduating off TAP. All members will be invited to attend
- A corrected copy of the 2020 Annual Report will be mailed to each member this month
- There will be one additional Focus group meeting scheduled pending the final approval of attendees. Information will be shared with members regarding the date and time

Chair Report

Lacy Rice, Jr. stated the Joint Committee reviewed the following referrals that were elevated to the IRS:

- **Issue #48702**, Ensure Taxpayers Security when using
- **Issue #48551**, Unequal Treatment of International Taxpayers
- **Issue #48550**, Out of Scope Public Announcement
- **Issue #41122**, Accessibility to TAC Offices
- **Issue #50966**, F1040 Review for Tax Year 2021
- **Issue #51076**, Schedule SE Employment Tax
- **Issue #51077**, Schedule C Profit and Loss for Business

- The Joint Committee's next scheduled meeting will be on October 28, 2021, 1:30 PM, EDT. Members were advised to attend the meeting if they have interest in being the TAP Chair or Vice Chair. Rice is available for questions.

Minutes Approval

TFPL Minutes for September 14, 2021 were approved as submitted.

Members of the Public

No members of the public were on the call.

Program Owner

James Bellinger stated there were no updates to share. He stated that the TAP Members are appreciated for all the hard work being done.

Subcommittee 1

Rosalind Matherne stated Subcommittee 1 met on October 5, 2021 and have two issues currently being reviewed by Systemic Advocacy (SA) and the Attorney Advisors (AA), as follows:

- **Issue #50542** *Where is My Refund Tag Line*
- **Issue #44245** *Natural Language Pilot Project on the EIP Line*

Subcommittee 2

Rice stated Subcommittee 2 met on October 6, 2021. Two issue were elevated to the Joint Committee (JC), as follows:

- **Issue #44243** *Fiscal Year 2021 Expansion of Customer Call Back to Additional Applications*. Rice suggested a change to the make a correction in the title to make the word "application" plural
Decision: No Objections, referral will be elevated to the Joint Committee
- **Issue #50678** *Communicating with 1040 Filers and Underserved Communities who do not have access to www.IRS.gov website and other electronic material*. A correction to the word publication making it plural
Decision: No Objections, referral will be elevated to the Joint Committee
- **Issue #44395** *Wrong Number* is currently being reviewed by SA and AA. Matherne added it will be discussed during next month's Full Committee meeting

Screening Committee

Andrea Price asked if Rosalind Matherne would provide updates. Matherne stated the Screening Committee meetings were cancelled due to lack of issues. A meeting will be held on next week anticipating there are enough issues to be screened.

Outreach

Pamela Memmer stated that the Activity Report for the month of September is as follows:

- Nine out of ten members submitted timely reports
100% Activity Reports submitted
83.6 Participation hours
9 Outreach hours
7,529 Audience reached
- Outreach activities in September included: unplanned conversations, Blog posts for local publications and professional associations, presentations at social organizations
- Outreach is a very important part of the TAP responsibilities and members advised to continue to do Outreach activities
- Members were encouraged to share feedback and experiences from participation in the Tax Forum booths. Information can be shared by sending an email to Memmer
- Feedback on what members can do to conduct virtual Outreach is needed.
- Rice stated sharing the TAP information to the colleges and elected officials would be good Outreach efforts and numbers.
- Memmer will share ideas to assist with Outreach by sending an email to members

Internal Communications Committee (ICC)

Rene Tiongquico stated the following:

- Committee reports from Subcommittee 1 and Subcommittee 2 were added to the ICC report
- Information was noted on Rice's participation in Kentucky with the African American Heritage
- Members were encouraged to inform Tiongquico of any activities they are doing so it can be added to the TFPL article for the TAP Newsletter

Action Items

Matherne shared the following Action items:

- Post the approved TFPL September 14, 2021 Meeting Minutes
- Elevate **Issue #44243** *The Expansion of Customer Call Back to Sixteen Applications* and **Issue #50678** *Communicating with 1040 Filers and Underserved Communities who do not have access to www.IRS.gov website and other electronic materials*
- Thank you expressed to each member for their attendance

Roundtable

- English stated she organized a meeting in her community to speak about TAP. This was a great opportunity to reach the grassroots individuals in your neighborhood. Members can use this as an idea for Outreach
- Jimerson stated the *Speak Up* brochures are available and can be mailed to members. Members encouraged to send Matherne their requests and copies will be mailed
- Ying Sa has an Outreach event on November 20, 2021 and would like to have some *Speak Up* brochures.
- Rice shared encouraging words to get out and continue to do Outreach

Close

Jimerson expressed appreciation to everyone who attended the call. The meeting was officially closed at 11:58 PM EDT.

**Next Meeting: Tuesday, November 9, 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.