

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, November 9, 2021**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Attendance

- | | | |
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| • 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. | Radcliff, KY | Chair |
| • Ying Sa | Des Moines, IA | Member |
| • April Smith | Birmingham, AL | Member |
| • Rene Tiongquico | Washington, DC | Member |

Members of the Public

- Abigail Ulcek

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) |
| • James E. Bellinger, IV | 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 (DFO's) Report was shared:

- Thank you to James Bellinger and Debra Awalt for their support
- November 17, 2021 the Internal Communications Committee (ICC) will have their final meeting for the year beginning at 12:00PM EDT

- November 17, 2021 the Outreach meeting is scheduled at 2:00PM EDT
- The Joint Committee will have their meeting on next week Thursday, November 18, 2021
- Returning members were asked to make their selections of committee preferences and send their choices to Annie Gold. Additional information will be shared on which committee will be assigned
- Congratulations were expressed to the following members who will be retiring from TAP: Lacy Rice, Cynthia Pinkney and Andrea Price

National Office Report

Terrie English welcomed members to the call. She shared the following updates:

- TAP year 2021 is wrapping up and preparations are moving forward for the 2022 TAP year
- Thank you to members for all the hard work in completing all of the referrals and getting them to the IRS after Joint Committee's approval
- November 18, 2021 the Joint Committee will have their meeting beginning at 1:30PM EDT. Members were encouraged to attend to find out what goes on with the approval process of the referrals
- November 19, 2021 the Graduation ceremony will begin at 1:00PM EDT for the members who have served three years and will be graduating off TAP. All members are invited to attend.

Chair Report

Lacy Rice, Jr. stated he did attend the Joint Committee meeting on October 28, 2021. The following referrals were approved and elevated to the IRS:

- **#50545**, Improve Where is My Refund on www.irs.gov
- **#44436**, Oil and Gas Royalty Specialty Training
- **#44276**, Review Tax Tips
- **#50678**, Communicating 1040 Filers and Under served Communities with no Access to www.irs.gov or electronic materials
- **#44243**, Fiscal Year 2021 Expansion Customer Call Back to Applicants
- **#50439**, Form W4 Employee Withhold Certification
- **#50226**, Form 944 Employer Annual Federal Tax Return
- **#41768**, Taxpayer and Tax Professionals Online Accounts with IRS
- Rice attended one of the Online Accounts meetings. Members were encouraged to sign up for the Online Accounts training
- Rice also attended the meeting for the 2022 TAP Chair and Vice Chair. There was one candidate for the Chair position and two candidates for the Vice Chair position. Pamela Memmer is included as a candidate for the Vice Chair position. Their statements were sent to members. If any member did not receive a copy they should contact Rice or

Rosalind Matherne. It has been posted onto www.TAPSpace.org for viewing

Minutes Approval

TFPL Minutes for October 12, 2021 was approved as submitted.

Members of the Public

Abigail Ulcek shared comments and her experience using the IRS toll-free 1040 phone line from a Low Income Taxpayer Clinic (LITC) with the Committee. She stated she supports the use of more phone line access.

Program Owner

James Bellinger expressed his thanks to the committee for all their hard work. He added he is looking forward to working with TAP next year.

- Debra Awalt expressed her thanks to the committee for their work this year. She will be completing all responses prior to her retirement effective December 31, 2021
- English congratulated Awalt and thanked her for all the support and work she has done for TAP
- Jimerson, Matherne and Rice shared congratulations and well wishes in Awalt's retirement
- Andrea Price congratulated Awalt in her retirement

Screening Committee

Price shared the following updates for the Screening Report

- The Screening Committee met and assigned the following issues:
#49623, Taxpayer having difficulty speaking to IRS by phone and does not have Email. The concern is how to help the elderly resolve their tax issues. This Issue was assigned to Subcommittee 1
#51194, related to the phone systems. This issue was assigned to Subcommittee 2. Pamela Memmer added clarification of the issue Jimerson added issues will be placed in the Parking Lot and carried over to the next year to be worked.

Price motioned and Memmer seconded.

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

Subcommittee 1

April Smith shared the following report. Subcommittee 1 met and recommended elevating:

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

Joseph Edelen motioned and Ying Sa seconded

Decision: Full Committee Consensus accept Subcommittee 1 report to elevate Issues #50542 and #44245

Subcommittee 2

Cynthia Pinkney expressed her thanks to members and staff. This is her final year with TAP. Subcommittee 2 met on November 3, 2021 and recommended elevating:

- **Issue #44395** *Amending the CT141L Notices to include the correct telephone number.*

Memmer motioned and Edelen seconded

Decision: Full Committee Consensus Issue #44395 be elevated to the Joint Committee

- **Issue #48550** Include a public service announcement notifying Taxpayers there is an out-of-scope topic list. A response from IRS was received. Their answer was not to adopt the referral. After discussion, Subcommittee 2 recommended this issue be carried over to next year for possible reconsideration

Memmer motioned and Edelen seconded

Decision: Full Committee Consensus to table Issue #48550 to next year 2022

Full Committee Consensus extend today's meeting 15 additional minutes:

Outreach

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

- 100% Activity Reports submitted
- 66.4 Participation hours
- 34.3 Outreach hours
- 20,627 Audience reached
- 298,974 Total Outreach hours for the year
- Outreach activities in October included: unplanned conversations, blog posts for local publications and professional associations and presentations at social organizations
- Memmer expressed thank you to members for a very successful year

- Returning member were asked to submit their activity report by November 25, 2021

Internal Communications Committee (ICC)

Pamela Memmer shared the following updates for ICC:

- ICC discussed updating the TAPSpace Member Guide during their last meeting. Final feedback was incorporated. The issue will be forwarded through the process for final approval.
- Option for the TAP Annual Report were also discussed during the last meeting. ICC reviewed three choices of what the cover would look like and discussed which cover would be appropriate.
- Discussions were held on transition from the Facebook group to a Facebook page. The Facebook group has been archived. Members were encouraged to submit interest in becoming an administrator for the Facebook page to Christine Scott or O'Sullivan

Action Items

Matherne stated she will complete the following action items:

- Post approved October 12, 2021 TFPL Minutes on www.TAPSpace.org
- Close and assign the Issues on SAMs per the Screening Report
- **Issue #50542** *Where is My Refund Tag Line*; **Issue #44245** *Natural Language Pilot Project on the EIP Line* and **Issue #44395** *Wrong Telephone Number* **will be elevated to the Joint Committee**
- Thank you to all the TAP members and TAP/IRS staff for a productive TAP year.

Roundtable

- Rice, Pinkney and Price summarized their respective experiences on the TFPL Committee and requested everyone attend the graduation ceremony.
- Each TFPL committee member thanked Rice, Pinkney and Price for their service on TAP.
- Matherne commended members for working together and getting the work done.
- English thanked the members for their service. Members were encouraged to have a safe and happy holiday.

Reminder, the Graduation Ceremony will be held on November 19, 2021

Closing

English officially closed the meeting at 12:10 PM EDT.

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