

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 12, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|---------------------|-------------------|----------------------------|
| • Marlon Bell | Pearland, TX | Member |
| • Donna Burris | Brooklyn, NY | Member |
| • Doris Carpenter | Florissant, MO | Member |
| • Debra Kurita | Fullerton, CA | Member |
| • Eugene Lillie | West Deptford, NJ | National TAP
Vice Chair |
| • Angela Madison | Los Angeles, CA | Member |
| • Robin Mosley | Centerville, OH | Member |
| • Jon Ramirez | Maize, KS | Vice Chair |
| • Richard Rodriguez | Stockton, CA | Chair |
| • April Smith | Birmingham, AL | Member |
| • George Williams | Ridgeland, MS | Member |
| • Sara Zanders | Fort Smith AR | Member |

Visiting Member

- Martha Lewis National TAP Chair

Staff

- | | |
|----------------------|--------------------------------------------|
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Gilbert Martinez | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment (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 updates were provided:

- April 19, 2022, beginning at 3:00 PM ET the Internal Communication Committee (ICC) will have their meeting. There will be a calendar invite sent to members
- April 21, 2022, beginning at 3:00 PM ET the Outreach Committee will have their scheduled monthly meeting. Eugene Lille is the lead for this committee
- April 28, 2022, the beginning at 1:30 PM ET Joint Committee will have their monthly meeting. Referrals are sent to the Joint Committee for approval. The meeting is open to the public. Members were encouraged to attend to get a clear overview of what goes on during the meetings
- Patience is needed during the changes occurring in www.TAPSpace.org
- Members can complete the Activity Reports directly in the system by signing onto www.TAPSpace.org

National Office

Terrie English welcomed members to the call and expressed her excitement in working with each member. She provided a brief introduction of herself.

- Members were reminded April 18, 2022 is the Tax filing deadline
- Appreciation was expressed to all members who are Tax Preparers attending the call
- WebEx will be phased out and replaced with Microsoft Teams
- A survey will be shared with members to help identify which systems each member has
- Staff members are in a transitional period and members were asked for their patience

Chair Report

Richard Rodriguez informed members:

- Consensus is defined in the TAP Member Handbook as an opinion or position reached by a group. Decisions are made by consensus.
- Ideas and opinions are important and needed. Each member will be allowed the opportunity to be heard
- Time constraints are in place for meetings

- Team leaders, Debra Kurita and April Smith were acknowledged and thanked for stepping up to be Leads
- Rodriguez added he will be the one to use the Robert Rules to make motions
- Members needing assistance or have questions were advised to reach out to Rodriguez and copy Rosalind Matherne
- Alert Rosalind Matherne and or Jimerson if your attendance in is meeting cannot be met

Minutes Approval

TFPL March 31, 2021 Meeting Minutes were approved as submitted. Rodriguez motioned and Robin Mosely seconded

Member of Public

N/A

Program Owner's Report

Michael Odom stated the following:

- There are no open referrals or recommendations pending
- There is one implementation check on **Issue #50542** *Where's My Refund* by March 4, 2022. The response is expected within a couple of days
- The English and Spanish text to use for the testing review is expected to be shared with the committee soon.

Subcommittee Report

Subcommittee 1

Kurita stated Subcommittee 1 had their meeting on April 5, 2022, and the following updates were provided.

- The W&I project related to **Issue #55354** *Voicebot Technology* was discussed.
- Subject Matter Experts (SMEs) have been asked to come to our next Subcommittee meeting to explain their responses regarding *Where is My Refund* and *Out of Scope* referrals

Subcommittee 2

Smith stated Subcommittee 2 attended Subcommittee 1's meeting on April 5, 2022

- They listened to the discussions on **Issue #55354**, Voice Box Technology
- The committee reviewed **Issue #50678** *Communicating with 1040 Filers and the underserved communities who do not have access to* www.IRS.gov

Internal Communications Committee (ICC)

Matherne stated Angela Madison and Sara Zanders volunteered to represent TFPL. The ICC prepares:

- Each project committee submits an article to the monthly TAP Newsletter
- Matthew O'Sullivan is the Committee Analyst and added the ICC will have their meeting on April 19, 2022. The articles are due to be submitted by the 25th of each month
- Rodriguez added the committee will support the volunteers for the ICC
- Members were advised to send comments or ideas to Matherne and or Jimerson

Outreach

Vice Chair, Jon Ramirez provided the following updates for the Outreach Committee

- Members were encouraged to reach out to the public to make them aware of what TAP does and how we support taxpayers
- Get ideas and share with each other
- Members are not alone in their Outreach efforts
- Some areas to consider are neighbors, social media, organizations

Ramirez stated that he will be reviewing all submitted monthly reports to summarize on a macro level and to highlight specific outreach activities performed by committee members.

Action Items

Matherne shared the following action items:

- Forward TFPL March 31, 2021, approved minutes to Kevin Brown for posting
- Share copies of previous Newsletters for the Full Committee to review
- Thank you to the committee for participation and attendance

Roundtable

Rodriguez went around the table and asked each member if they had any comments

- Lillie suggested reviewing the Resources on TAPSpace to support Outreach activities
- Robin Mosley suggested members share their experiences for the newsletter article.

- George Williams is interested in reaching individuals and needs more information. Rodriguez will speak with Williams and provide him with additional information. Smith also added she will contact Williams to assist
- Zanders needs clarification to begin. Rodriguez assured no one is alone
- Kurita agreed she too feels the same way in working with everyone and getting ideas to perform Outreach and become more social media ready
- Smith stated she is excited and looking forward to working with everyone
- Ramirez shared his excitement in the feedback members provided
- Lillie added he wrote an email regarding IRS technology on the toll-free phone lines. He asked if Matherne to share it with the Committee members
- Matherne shared there will be a meeting with the Mentorship program on April 25th Members were encouraged to reach out to Matherne if they had any questions.

Jimerson thanked members for their attendance. TAP Staff is available to each member to assist and answer questions. A major focus of TAP is for each member to share TAP's mission and listen to taxpayers. Questions are to be brought back to TAP.

Close

Jimerson thanked members and the meeting was officially closed at 3:58 PM ET.

**Next Meeting: Tuesday, May 10, 2022
3:00 PM ET, 2:00 PM CT, 1:00 PM MT, 12:00 PM PT**

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