

**Toll-Free Phone Lines (TFPL) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, May 10, 2022**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

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| <ul style="list-style-type: none"> <li>• Donna Burris</li> <li>• Doris Carpenter</li> <li>• Debra Kurita</li> <li>• Eugene Lillie</li> </ul>   | <p>Brooklyn, NY<br/>Florissant, MO<br/>Fullerton, CA<br/>West Deptford, NJ</p>                                 | <p>Member<br/>Member<br/>Member<br/>National TAP Vice<br/>Chair/Member</p> |
| <ul style="list-style-type: none"> <li>• Angela Madison</li> <li>• Robin Mosley</li> <li>• Jon Ramirez</li> <li>• Richard Rodriguez</li> <li>• April Smith</li> <li>• George Williams</li> </ul> | <p>Los Angeles, CA<br/>Centerville, OH<br/>Maize, KS<br/>Stockton, CA<br/>Birmingham, AL<br/>Ridgeland, MS</p> | <p>Member<br/>Member<br/>Vice Chair<br/>Chair<br/>Member<br/>Member</p>    |

**Member Absent**

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|---|---------------------------------------|--------------------------|
| <ul style="list-style-type: none"> <li>• Marlon Bell</li> <li>• Sara Zanders</li> </ul> | <p>Pearland, TX<br/>Fort Smith AR</p> | <p>Member<br/>Member</p> |
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**Visiting Member**

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| <ul style="list-style-type: none"> <li>• Martha Lewis</li> </ul> | <p>Colorado Springs, CO</p> | <p>National TAP Chair</p> |
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**Staff**

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| <ul style="list-style-type: none"> <li>• Terrie English</li> <li>• Rosalind Matherne</li> <li>• Conchata Holloway</li> <li>• Matthew O'Sullivan</li> <li>• Gilbert Martinez</li> <li>• Annie Gold</li> <li>• Michael Odom</li> <li>• Rosemarie Rixey</li> </ul> | <p>TAP Director<br/>TAP Program Analyst<br/>TAP Program Analyst<br/>TAP Program Analyst<br/>TAP Program Analyst<br/>TAP Administrative Assistant<br/>Wage &amp; Investment Customer Services (W&amp;I)<br/>W&amp;I</p> |
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### **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:

- The Activity Reports submission process has been changed and is now on [www.TAPSpace.org](http://www.TAPSpace.org) for members. The process is easier and members were encouraged to submit any questions to Rosalind Matherne or Jimerson
- On May 18, 2022, the Ad Hoc Committee for the TAP Chairs will meet at 2:30PM EDT
- On May 19, 2022 beginning at 12:00PM, EDT the Outreach Committee will have their meeting. Dr. Eugene Lillie is the lead on this committee. The project committees' Vice Chairs will be in attendance
- On May 25, 2022, beginning at 12:00PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting
- On May 26, 2022, beginning at 1:30PM, EDT Joint Committee will have their monthly meeting. The Chairs, Vice Chairs and ICC attend this meeting. Members were encouraged to attend to get a clear overview of what goes on during the meetings. This meeting is opened to the public
- On May 30, 2022, TAP office will be officially closed in recognition of Memorial Day

### **National Office**

Terrie English welcomed members to the call and provided the following National Office updates:

- IRS Tax Forums are scheduled to begin on July 19, 2022 and run through August 18, 2022. This is a form of Outreach. The Outreach Analyst will be reaching out to members to see if anyone would be interested in volunteering.
- TAP 2023 Interview process has begun. Applicants have all gotten their applications completed. The application process takes time. Members will be receiving an email invite to volunteer in assisting with the interviews. Members were encouraged to participate and take advantage of the opportunity to find out what happens in the process.
- Business cards will be ordered for new members and returning members who may need additional cards.
- ID Name Badges will be ordered for all new members
- On June 13, 2022, beginning at 1:30PM, EDT the TAP first quarterly meeting will be held. The National Taxpayer Advocate, Erin Collins will be the featured guest speaker.

### **Chair Report**

Richard Rodriguez welcomed members to the call.

- Information was shared with members from the Joint Committee's last meeting held. Members were sent an email with the information
- April through November were the timeframes for TAP during this year. A calendar with the timeframes was shared in the email to give members a prospective of what the committee could do within the time constraints

### **Minutes Approval**

TFPL April 12, 2022 Meeting Minutes were approved as submitted.

Rodriguez motioned and Debra Kurita seconded

### **Member of Public**

N/A

### **Program Owner's Report**

Michael Odom stated the following:

- There are no open referrals, no reconsiderations, or implementations
- Members are currently working on the Voicebot and appreciation was expressed for the assistance provided.
- Subject Matter Experts (SMEs) answered questions on the following Issues:
  - Issue # 50542** *Where is My Refund*
  - Issue # 48550** *Out of Scope Public Service Announcements*
  - Issue # 50678** *1040 Filers in Underserved Communities*

### **Subcommittee Report**

#### **Subcommittee 1**

Debra Kurita stated Subcommittee 1 meeting was held on May 4, 2022 and the following are updates from that meeting:

- Information was shared during their meeting by the SME, Thomas Martin from W&I. He answered questions on the Voicebot and walked members through the technology process and extended the deadline for the project.
- The SME provided information on two Issues: **Issue # 50542** *Where is My Refund Tag Line* and **Issue # 48550** *Out of Scope Public Service Announcement*. A lot of good information was provided.
- Updates were shared by the SME on things they are currently working on and where they are in the process.

- There will be a Chatbot project in June. The Subcommittee asked if they could assist with testing the Chatbot. A response is expected soon
- The subcommittee recommendation for **Issues # 48550** and **# 50542** are to be closed because the Committee accepted the IRS response. Rodriguez motioned and April Smith seconded.

**Decision: Full Committee Consensus to close Issue # 48550 Where is My Refund Tag Line and Issue # 50542 Out of Scope Public Service Announcement**

### **Subcommittee 2**

April Smith stated Subcommittee 1 meeting was held on May 3, 2022 and the following are updates from that meeting:

- Subcommittee 2 members attended Subcommittee 1 meeting with the SMEs. They were able to get answers to their questions
- The Voicebot does not recognize acronym ITIN. Odom acknowledged and stated he appreciate the feedback and will be looking into the issue
- Subcommittee 2 recommendation for **Issue # 50678 Communicating with 1040 Filers** is to close the issue because the Committee accepted the IRS response Rodriguez motioned and Robin Mosley seconded

**Decision: Full Committee Consensus to close Issue # 50678 Communicating with 1040 Filers as IRS accepted response**

Rodriguez extended appreciation and encouragement to members on doing a great job in making a legacy for TFPL in working through Issues bringing them to closure.

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

Rodriguez shared the following updates for ICC:

- Members were asked to submit a statement on what they are doing which will be incorporated in the newsletter article.
- Members were encouraged to focus on the Voicebot project and submit any ideas to ICC going forward

### **Outreach**

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

- Outreach committee had their first meeting on April 21, 2022. The Vice Chairs focused on getting to know each other and what they would accomplish
- Members were reminded to submit their activity reports monthly and on time
- Members were encouraged to submit their reports using [www.TAPSpace.org](http://www.TAPSpace.org)

- Ramirez receives a report reflecting everyone's submission. He stressed submitting the Activity Reports timely
- Work done on the Voicebot should be considered committee work and not Outreach
- Members were encouraged to reach out to their Local Taxpayer Advocates (LTAs) and work with them. Find out what activities they have scheduled.
- Ramirez has the LTAs information readily available for members upon request
- Members were encouraged to reach out to Matherne, Jimerson or Ramirez with questions

### **Action Items**

Matherne shared the following Action items:

- Forward TFPL April 12, 2022, approved minutes to Kevin Brown for posting
- Close the following Issues in the system:
  - Issue # 48550** *Out of Scope Public Service Announcement to the VRU*
  - Issue # 50542** *Where's My Refund Tag Line*
  - Issue # 50678** *Communications with Underserved Communities*
- Send reminder that the Screening Committee meeting will be on May 19, 2022
- Matherne reminded members to contact her, Jimerson, Rodriguez or any member with questions or concerns

### **Roundtable**

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

- Kurita shared she was the one who Ramirez was speaking about who met with the LTA in person. The individuals appreciated the information she shared. She expressed appreciation for encouraging members to help with Outreach by meeting with the LTA in person
- Angela Madison requested information on what is expected from the Chair of the ICC committee. She asked for an overview of the duties and responsibilities
- Matthew O'Sullivan added he and Jimerson will meet with Madison during the meeting scheduled for May 25, 2022, to go over the responsibilities
- Smith shared how the monthly reports submissions process is working well and going smoothly
- Ramirez stressed the importance to continue to submit the monthly reports on time, be creative in working Outreach in individual areas and across the states, share ideas with each other and email or call Rodriguez, Matherne, Jimerson or him

- Rodriguez extended his appreciation to members of TFPL for being well aligned and reminded everyone that the things done by members impact others
- Martha Lewis expressed appreciation and thanked the members for a great job

Jimerson thanked the members for their attendance. TAP Staff is available to assist and answer questions.

**Close**

Jimerson thanked members again and for their attendance and the meeting was officially closed at 3:58 PM EDT.

**Next Meeting: Tuesday, June 14, 2022  
3:00 PM EDT, 2:00 PM CDT, 1:00 PM MDT, 12:00 PM PDT**

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