

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, June 14, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|---------------------|-------------------|----------------------------------|
| • Donna Burris | Brooklyn, NY | Member |
| • Doris Carpenter | Florissant, MO | Member |
| • Anthony Earwood | San Antonio, TX | Member |
| • Debra Kurita | Fullerton, CA | Member |
| • Eugene Lillie | West Deptford, NJ | National TAP
V-Chair & Member |
| • 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 |

Member Absent

- Sara Zanders Fort Smith, AR Member

Visiting Member

- Martha Lewis Colorado Springs, CO National TAP Chair

Staff

- | | |
|----------------------|---|
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Gilbert Martinez | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment Customer Services (W&I) |

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the Agenda was provided with the following updates:

- June 15, 2022, the Ad Hoc Committee for the TAP Chairs and ICC will meet at 2:30PM EDT
- June 16, 2022, beginning at 12:00PM EDT the Outreach Committee will have their meeting. Dr. Eugene Lillie heads this committee. The project committees' Vice Chairs will be in attendance
- June 22, 2022, beginning at 12:00PM EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting. The ICC works on external and internal communications. They also work on the Handbook
- June 22, 2022, the Mentorship Wrap-up session will begin at 3:00PM EDT. New Members and their mentors will have the opportunity to discuss things that have worked well, improvements, and finalizing for the year. Thank you was express
- June 23, 2022, the beginning at 1:30PM EDT Joint Committee will have their monthly meeting. TAP National Chair, Martha Lewis heads this committee. The Chairs attend this meeting

National Office

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

- Thank you and appreciation was expressed to members who attended the Quarterly meeting that was held yesterday, June 13, 2022. Members were encouraged to submit any questions or concerns they may have and want to be elevated to the National Taxpayer Advocate, Erin Collins. Send them to your Analyst, Rosalind Matherne
- Members were reminded there are protocols to follow when approached by the Media. During the Quarterly meeting, the Communications, Stakeholder Liaison & Online Services (CSO) Media Team shared information on what to do if approached by the Media
- Members were encouraged to sign-up for the IRS Virtual Tax Forums which are scheduled to begin on July 19, 2022 and run through August 18, 2022. Members can volunteer to answer questions about TAP. It is not required to be a tax professional. This will be a great opportunity to experience what taxpayers are asking. For additional information please contact Antoinette Ross

Chair Report

Richard Rodriguez welcomed members to the call.

- Welcome to Anthony Earwood, TFPL newest member
- Earwood shared information about himself
- Members were reminded to stay on track submitting their Activity Records
- George Williams volunteered to do the article for the Newsletter this month. He will talk more about Outreach and encourage Members to participate more and share what they are doing
- Articles should not only on be about the issues being worked but what the public is saying and what is being done about the things they say
- Members were encouraged to reach out to Rodriguez with questions or for assistance

Minutes Approval

The TFPL May 10, 2022 Meeting Minutes were approved as submitted. Jon Ramirez motioned and Doris Carpenter seconded.

Member of Public

N/A

Program Owner's Report

Michael Odom stated the following:

- There are no open referrals, no reconsiderations or implementations
- There is one open question in three parts; efforts with senior citizens, inmate emails/how inmates can get help with their taxes and the web chat project testing. They are all due on June 28, 2022

Subcommittee Report

Subcommittee 1

Debra Kurita stated Subcommittee 1 meeting was held on June 1, 2022 with the following updates:

- Subject Matter Expert (SME) from W&I attended the meeting and provided an overview of the IRS Certified Accepted Agent program. Subcommittee 1 has begun working on Issue #57616 *Certified Acceptance Agent Modification*. Thank you expressed to Michael Odom for expediting the request to have the SME to come to the meeting
- Issue #55354 *The Voice Box Project* testing period has closed. The referral will be ready for the next full committee meeting
- The next Subcommittee 1 meeting is scheduled for July 6, 2022

Subcommittee 2

Rosalind Matherne shared the following updates:

- June 7, 2022, Subcommittee 2 had their monthly meeting
- SME presented an overview of the IRS 1040 phone line and explained how they are working to address wait times, staff shortage and improve phone systems. They provided a detail call flow chart. These chart will be helpful for future referrals
- Subcommittee 2 finalized testing for Issue #55354 *The Voice Box Project* and working with Subcommittee 1 to finalize the referral
- Testing results have been forwarded to W&I to be used in real time
- Subcommittee 2 is working on Issue #50367 ID Verification via Phone Required by 4883C Letter
- Several of the subcommittee members had connectivity issues and could not be on the call. Thank you was expressed to Robin Mosley for leading the call and who did a great job
- Their next meeting is scheduled for July 6, 2022

Screening Committee Report

Robin Mosely shared the following updates:

- The Screening Committee met two times; May 10, 2022, and June 2, 2022
- A total of 170 suggestions were screened
- Appreciation expressed to IRS for dealing with all of the negative comments that were made in the suggestions and pushing through to provide services to taxpayers as requested
- TFPL had two issues to be transferred; Issue #52603 *Searching Publications and Topics* was transferred to Tax Forms and Publications (TFP) Committee and Issue# 57399 *General Public Contact* will be transferred to Taxpayers Assistance Committee (TAC)
- Issue #50367 *ID Verification via Phone Required by 4883C Letter*. This issue will remain with TFPL to work
- All other issues were closed including Issue #4110 *Taxpayer Survey Data Report* in the Parking Lot
- The next Screening Committee meeting is scheduled for June 16, 2022, at 3:00PM EDT

Richard motioned to accept the Screening Committee's report and Jon Ramirez seconded

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

English expressed appreciation to being able to see in writing when a person or employee is being spoken to rudely and for them to maintain their composure, Thank you to Mosley for sharing

Internal Communications Committee (ICC)

Angela Madison shared the following updates for ICC:

- ICC last meeting was held on May 25, 2022
- ICC members are reviewing chapter seven of the Handbook. They will provide feedback with any suggested changes during next month's full committee meeting
- Members were asked to share any comments or ideas with the committee
- ICC is continuing work on developing a template for the Newsletter that would show what each committee is working on
- Victoria Ramirez accepted the Vice Chair position and Madison as Chair

Outreach

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

- Williams participated in an Outreach event sponsored by a church. He educated about 15 individuals on TAP
- A comment was made during Williams Outreach regarding refunds. IRS has updated their website www.irs.gov under Where is my Refund tool. Members may contact Ramirez with questions
- Members were encouraged to share any Outreach activities or events with Ramirez and the committee
- Angela Madison and Debra Kurita met with their LTA and participated in an Outreach event. Members were encouraged to share any events or activities they have done with Ramirez and the committee
- The Outreach report for May includes: 81.82 % timely submissions, 71 volunteer hours for April and 53 hours for May. These numbers are gathered from the reports
- Members who may be struggling with ideas to do Outreach should reach out to Ramirez
- There will be an Outreach meeting on June 16, 2022 at which time more information will be shared

Action Items

Matherne shared the following Action items:

- Forward TFPL May 10, 2022, approved minutes with correction to reflect Carpenter as present to Kevin Brown for Posting
- Issue #52603 will be assigned to TFP, Issue #57399 will be assigned to TAC
- TFPL will keep Issue #54367 TFPL and has assigned it to Subcommittee 2
- Close Issue #41103 *Survey Data* in the Parking Lot
- Follow up with Odom on the answers to the open questions regarding senior citizens, Inmates emails and webchat

- The Voice Box testing has been completed and the Subcommittees are finalizing the referral.

Roundtable

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

- Williams asked if the assistors on the Toll-Free lines provided their name and ID number to Taxpayers who call. Jimerson and Odom confirmed the assistors are to provide their badge ID number and name. English added IRS employees are to share their name and ID Badge number on the calls
- Lillie thanked Williams and all members who participated in Outreach. Ramirez report was great. Members were encouraged to take photos during their activities
- Donna Burris informed the committee she was on the call and encouraged members to acknowledge themselves when they call in so that their presence would be know
- Kurita shared the Outreach she and Angela attended was the San Fernando Valley California Society of Enrolled Agents. It was a two-hour presentation. They learned a lot and had an opportunity to share at the meeting
- Ramirez shared encouragement to members on how important and valued their input and participation is. This is for new members and returning members. Rodriguez added he will share information to encourage members to try things that may be uncomfortable
- Martha Lewis expressed appreciation and thanked members for a great job. Members were reminded to participate during the Tax Forums , continue submitting the Activity Records on www.TAPSpace.org which are important to the success of TAP
- Rodriguez added support is available. “Together we can do anything.”

Jimerson thanked members for their attendance. Welcome expressed again to Earwood for being a part of TFPL. The Staff is ready and available to assist.

Close

Jimerson thanked members and the meeting was officially closed at 2:58 PM ET.

**Next Meeting: Tuesday, July 12, 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.