

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 9, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|---------------------|-------------------|----------------------------------|
| • Donna Burris | Brooklyn, NY | Member |
| • Anthony Earwood | San Antonio, TX | 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 |

Members Absent

- | | | |
|-------------------|----------------|--------|
| • Doris Carpenter | Florissant, MO | Member |
| • Debra Kurita | Fullerton, CA | Member |
| • Sara Zanders | Fort Smith, AR | Member |

Staff

- | | |
|----------------------|---|
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O'Sullivan | 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 DFO updates:

- The Joint Committee's Planning Session began today, August 9th. Members were encouraged to listen in on the discussions
- August 18, 2022, the Ad Hoc Committee for the TAP Chairs and ICC will meet at 2:30 PM EDT. Members were reminded to review their email messages. If no

message was received, members should contact Rosalind Matherne for further information

- The monthly Ad Hoc meeting scheduled for August has been cancelled
- August 18, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting. Dr. Eugene Lillie heads this committee. The project committees' Vice Chairs will be in attendance
- August 24, 2022, beginning at 12:00 PM EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting regarding the Facebook page, external and internal communications. They also work on the Handbook
- August 24, 2022, beginning at 1:30 PM, EDT Joint Committee (JC) will have their monthly meeting

National Office

Terrie English could not attend the meeting. She was in attendance at the JC Planning Session.

Chair Report

Vice Chair, Jon Ramirez welcomed members to the call.

- Members were encouraged to continue to assist with referrals as needed and participate in the Ad Hoc committee teams

Minutes Approval

The TFPL July 12, 2022, Meeting Minutes were approved as submitted.

Members of the Public

N/A

Program Owner's Report

Michael Odom stated the following:

- There were no open referrals, no reconsiderations and no implementations
- He is waiting on the response for one question regarding the Certified Acceptance Agent question. It is due by August 26, 2022, if not sooner

Subcommittee Report

Subcommittee 1

Rosalind Matherne shared the following updates for Subcommittee 1:

- Meeting was held on August 3, 2022
- They discussed **Issue #57616** *Certified Acceptance Program Modification*. They reviewed and finalized the referral that is ready to be elevated
Eugene Lillie motioned to elevate and Angela Madison seconded

Decision: Consensus Full Committee approved to elevate Issue #57616 to the JC

Subcommittee 2

April Smith shared the following updates:

- Subcommittee 2 had their meeting on August 2, 2022
- They reviewed **Issue #50367** *ID Verification via Phone Required by 4883C Letter* and **Issue #60890** *Chat Box Project*
- Subcommittee 2 recommendation for **Issue #50367** reviewed and accepted the IRS response stating the issue has been addressed and agreed to close this issue
- SMEs attended the Subcommittee meeting and answered questions regarding **Issue #60890** for both Subcommittee 1 and

Robin Mosley motioned to close Issue #50367 and accept the Subcommittee 2 report. Donna Burris seconded

Decision: Consensus Full Committee accept Subcommittee 2 report and close Issue #50367

Screening Committee Report

Robin Mosely stated the Screening Committee agreed to cancel their meeting because there were no pending new issues to review. They will meet next month and will report out to the full committee.

Internal Communications Committee (ICC)

Angela Madison shared the following updates for ICC:

- ICC members are working on edits and updates for chapter eight of the TAP Handbook
- Matthew O'Sullivan worked on the screenshots and provided current updates.
- Members were asked to share any comments or ideas with the ICC

Outreach

Ramirez provided the following updates for the Outreach Committee

- 1,257 hours volunteer time turned in
452 people were reached in July
- Members were encouraged to continue to find ways to do Outreach in local areas
- Reminder to continue to submit Activity reports and expressed appreciation for members efforts

Action Items

Matherne shared the following Action items:

- Forward TFPL July 12, 2022, approved Minutes to Kevin Brown for posting
- Elevate **Issue #57616** and close **Issue # 50367**

- Follow-up with Michael Odom on the Certified Acceptance program

Roundtable

Ramirez asked each member if they had any comments

- Richard Rodriguez encouraged members to send emails to him if they had any issues needing to be raised during the JC's Planning Session
- George Williams shared he participated in an Outreach event. After speaking with several individuals including the Local Taxpayer Advocate (LTA) and State's representative. He shared business cards and information about TAP. There was a conversation on IRS personal account. A Taxpayer was able to receive their refund with the proper guidance from the LTA. Positive feedback on the Customer Service response by the Taxpayer was given
- Ramirez asked about any struggles in doing Outreach.
- Eugene Lillie shared how easy it is to talk with people. He encouraged members to discern whether a systemic problem exists or is it a personal problem. This could lead to possible issues to work on. Members were encouraged to reach out to their LTA and if any member is having any issues getting in contact with their LTAs were encouraged to reach out to Matherne, Jimerson and Lillie. Jimerson pointed out a possible reason could be the LTA is away and has an Acting LTA. She encouraged the members to help the staff help them
- Matherne added she spoke with the LTA located in New Mexico who would like to know the TAP representative
- Angela Madison stated she met with the LTA in Southern California. She had the opportunity to speak on some issues Taxpayers are having
- Anthony Earwood shared he was meeting with the LTA in Austin. They are working with small business development and around twenty individuals training through a webinar. Lots of tax information and individual issues, looking forward to getting a lot of things done in Texas
- Williams added a local preparer reached out to him and submitted his application for the Certified Acceptance program

Jimerson expressed appreciation and thank you to all the members who participated in today's meeting. Great job to Ramirez in leading the meeting. Members were encouraged to join in and listen to the JC's Planning Session.

Close

Meeting was officially closed at 3:58 PM EDT

**Next Meeting: Tuesday, September 13, 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.

