

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, September 13, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|---------------------|-------------------|----------------------------------|
| • Donna Burris | Brooklyn, NY | 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 |

Members Absent

- | | | |
|---------------------|----------------|--------|
| • Doris Carpenter | Florissant, MO | Member |
| • Richard Rodriguez | Stockton, CA | Chair |

Visiting Member

- | | | |
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| • Martha Lewis | National Office | TAP Chair |
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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:

- September 15, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting
- September 21, 2022, the Ad Hoc Committee for the TAP Chairs and ICC will meet at 2:30 PM, EDT. Member were reminded to review their email messages. If no message was received members should contact Rosalind Matherne for further information
- September 22, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting
- September 28, 2022, beginning at 12:00 PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting

National Office

Terrie English could not attend the meeting.

Chair Report

Vice Chair, Jon Ramirez welcomed members to the call and provided the following Chair report:

- Richard Rodriguez could not be on the call today but provided Ramirez with his report
- Members were encouraged to review Commissioner Rettig's email message for people to have insight on questions they may face
- The Joint Committee had a great meeting. Information that was shared with members: Media, top ten calls, call backs and Systemic Advocacy
- Information for September, October and November issues to be completed this calendar year were shared
- TAP's twentieth year anniversary will be held on October 1, 2022. Members were encouraged to submit comments or quotes to Gilbert Martinez
- Information will be sent to members for the January 2023 Taxpayers Appreciation Day
- Thank you to members who participated and will continue to participate in the Most Serious Problems meetings being held

Minutes Approval

The TFPL August 9, 2022, Meeting Minutes were approved as submitted. Robin Mosley motioned to approve the minutes and Eugene Lillie seconded.

Member of Public

N/A

Program Owner's Report

Michael Odom stated the following:

- There are two open referrals: #55354 VoiceBot due on September 21, 2022 and #57616 Certified Acceptance Program Modification due October 13, 2022
- There were no reconsiderations and no implementations checks

Subcommittee Report

Subcommittee 1

Debra Kurita shared the following updates for Subcommittee 1:

- Meeting was held on September 7, 2022
They discussed three issues:
- Issue #61226 Update Services on where is my refund. Rosalind Matherne will forward this issue to SA and the Attorney Advisor for review. Subcommittee 2 will present to the full committee on next month
- Issue #59168, Extended Hours for Customer Service Representatives was finalized. Matherne will forward to SA and the Attorney Advisor for review.
- Issue #60890, Testing IRS Web Box both Subcommittee 1 and Subcommittee 2 will be working this issue together
- Subcommittee 1 will have their next meeting on October 5, 2022

Subcommittee 2

Rosalind Matherne shared the following updates:

- Subcommittee 2 is working on Issue #60890, Testing IRS Web Bot. They have agreed to an Ad Hoc meeting on September 27, 2022. Members from Subcommittee 1 will be attending. Sections of this issue have been assigned and are due on September 27, 2022
- Subcommittee 2 will have their next monthly meeting on September 24, 2022

Screening Committee Report

Robin Mosely shared the following updates for the Screening Committee:

- The Screening Committee had their meeting on August 18, 2022
- Twenty-one suggestions were screened
- Sixteen were closed
- Five suggestions were assigned: Subcommittee 1 was assigned Issue #61226, Update Services to Where is My Refund; Issue #60122 IRS Refund Status Results, Issue #60602 Full Mailbox for 1-800 numbers
- Two issues were assigned to Subcommittee 2: Issue #60127 Hire More People to Answer the Phones and Issue #60128 Make it Easier for Taxpayers to Contact the IRS

Internal Communications Committee (ICC)

Angela Madison shared the following updates for ICC:

- ICC members are working on Chapter eight of the Handbook to suggest possible edits or updates
- Matthew O'Sullivan worked on the screenshots and provided current updates. He added he would look further and provide any additional updates
- Members were asked to share any comments or ideas with the committee

Outreach

Ramirez provided the following updates for the Outreach Committee

- Last month was a good month for volunteer hours
- Members were encouraged to share highlights from Outreach activities they may have done and or successes they may have had
- Lillie shared encouragement when dealing with the LTAs. He has had great experiences dealing with his LTA. They are helpful, timely, cooperative and they all have resolved the problems. Not living in the area as the LTA does not mean members are not able to refer individual to the LTA. He assured members if they have any issues in getting a response from the LTA, contact him and he will get in touch with the LTA on their behalf. He referred a taxpayer from Houston to the LTA in Houston. The LTA contacted the taxpayer within twenty minutes and was able to resolve the problem getting the taxpayer the help needed
- George Williams shared his LTA reached out to set up a meeting on next month. He is excited about the relationship they are building
- Kurita agreed with Lillie that contacting the LTAs is very helpful working with them. She encouraged members to read the article she and Madison wrote about their Outreach efforts and working with the LTAs. The Outreach effort done in August Kurita worked in the virtual booth was very interesting
- Mosley added she worked in the virtual booth and she was able to assist a couple of individuals
- Madison stated she did two Outreach events. One was an audience of two hundred with standing room only. No one had heard of TAP. There were fifteen to twenty people in a smaller room. One person had heard of TAP. They were aware of the Inflation Reduction Act. It was disappointing on the mixed messages. When the opportunity is presented, speak on TAP
- Lillie reminded members if they have pictures of their events to send them Matherne

Action Items

Matherne shared the following Action items:

- Forward TFPL August 9, 2022, approved minutes to Kevin Brown for posting

- Issue #61226 and Issue #59168 are being reviewed by SA and the Attorney Advisor
- Subcommittee 2 will have an Ad Hoc meeting on September 27, 2022 to review and finalize the referral Testing the IRS Web Chat

Roundtable

Ramirez asked each member if they had any comments

- April Smith inquired about the communities not being aware of the TAP program. She has experienced that issue. She asked if there was a way for IRS to push the knowledge about TAP with taxpayers. Jimerson informed the members how getting the word out about the TAP program is the responsibility of the Staff and TAP members. Periodic messages are sent to IRS to help get the awareness out but the main focus of TAP is to get the word out. Angela added Smith is welcome to join the ICC where they craft posting on their social media accounts for greater awareness
- Williams added how there have been people who have asked if they were able to go online and schedule an appointment and they would get back with a designated time. Someone did mention something about the Inflation Reduction Act. Lillie assured members they will be asked about this issue. He will share the information provided by the Commissioner with members
- Lillie reminded members to respond to Gilbert Martinez message requesting a quote be shared with him to be included in the twentieth-year report. Encouragement to members to finish the year strong. Members in the background their voices are needed
- Gilbert Martinez shared he posted the Setting the Record Straight message from the Commissioner on the TAP Facebook page. It was accepted by the administrators and is there for viewing
- Mosley asked Jimerson about the restructuring letter Erin Collins sent out. Matherne shared information on TAP Staff reporting to SA. No impact will affect the members.
- Jimerson informed the members being aligned under SA, they will be able to help with projects TAP is doing and a direct line with SA. CSO will continue to help with communications in getting messages out and the with the Annual Report, and to sites improve also www.TAPSpace.org. Meetings are being held on today to discuss various things going on. The follow up letter from the Commissioner will be moved over. A lot of things will happen to improve customer service for Taxpayers. It will give IRS the opportunity to improve their technology, work with Taxpayers to improve compliance, improvements to IRS websites and to make better and more efficient for Taxpayers, to help with their communication with IRS and their voluntarily compliance



- Martha Lewis thanked members for their hard work. Everyone is doing a great job. Members interested in being the National Chair or Vice Chair were encouraged to reach out to Lillie or herself for more information

Jimerson expressed appreciation and thank you to all the members who participated in today's meeting.

Close

Meeting was officially closed at 4:00 PM ET

**Next Meeting: Tuesday, October 11, 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.