



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 11, 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 |
| • George Williams | Ridgeland, MS | Member |

Members Absent

- | | | |
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| • Doris Carpenter | Florissant, MO | Member |
| • April Smith | Birmingham, AL | Member |

Visiting Member

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

- | | |
|----------------------|---|
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • James Bellinger | 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:

- Changes have been made with staffing duties: Rosalind Matherne is the

- Analyst leading the Internal Communications Committee (ICC) while Matthew O'Sullivan has been temporarily assigned to be the Lead Analyst over the Joint Committee. The assignments will last until November 30, 2022, the end of the TAP year
- Information from the Activity Reports are used for the Annual Report and it is made available to the public. Members were encouraged to take time to do their reports and add all their information to receive credit for their hours. Susan Jimerson is the Lead for the Annual Report
 - October 13, 2022, is the deadline to volunteer to be a part of the Annual Report Committee
 - October 19, 2022, the Annual Report Committee will have their first meeting. Their goal is to have the report completed by the end of January, 2023
 - October 19, 2022, the Ad Hoc Chair meeting will begin at 2:30 PM EDT. The Chairs will discuss issues for the TAP
 - October 20, 2022, the Outreach Committee will have their scheduled meeting beginning at 12:00 PM EDT. Eugene Lillie is the Lead
 - October 26, 2022, the ICC will have their meeting starting at 12:00 PM, EDT. Matherne is the Analyst and Angela Madison is the Chair
 - October 27, 2022, the Joint Committee will have their scheduled meeting beginning at 1:30 PM EDT

National Office

Terrie English welcomed everyone to the call and provided the following National Office Report:

- TAP year 2022 is winding down. Members were encouraged to push forward to complete any tasks being worked
- October 27, 2022, the Joint Committee will have their meeting. Members were encouraged to finalize any referrals items to get onto their agenda
- The TAP new Logo has been placed on the website. Members were encouraged to go onto the website and look at it and review the changes
- Erin Collins, National Taxpayer Advocate (NTA) will be submitting a Blog about TAP. Members were encouraged to watch for the information
- Members were encouraged to add the time spent onto the Activity Reports
- Nominations for Chairs have been received and their statements are due October 15, 2022. Members will be able to listen during the meeting
- Thanks and appreciation was expressed to members who are or have participated in the Ad Hoc Teams meetings. Erin Collins, NTA will add the information on the Most Serious Problems (MSP) in the Annual Report to Congress



Chair Report

Richard Rodriguez welcomed members to the call and provided the following Chair report:

- Thank you expressed to members who submitted an article for the Newsletter
- TFPL has one month remaining in TAP year 2022. New leadership will begin for 2023
- The Joint Committee's meeting is approaching. Members were encouraged to complete all referrals in order to get them on the Joint Committee's Agenda
- There will be no committee meetings held in December because the TAP year will be over
- Members were encouraged to volunteer to assist the Annual Report Committee. Susan Jimerson is the contact for this Committee
- Recognitions extended to members. To Donna Burris for her dedication and work she has done. This is Burris' third year with TAP and she will be rotating off as of December 2022
- Members were encouraged to add their time onto the Activity reports. There is an recognition program that is based upon the number of hours each member has volunteered
- Thank you to members who participated and will continue to participate in the Most Serious Problems meetings being held

Minutes Approval

The TFPL September 13, 2022, Meeting Minutes were approved as submitted. Debra Kurita motioned to approve the Minutes and Eugene Lillie seconded.

Member of Public

N/A

Program Owner's Report

James Bellinger agreed to cover for Michael Odom who is on an assignment. He shared the following:

- W&I has one open referral due in a couple of days: #57616 Certified Acceptance Program Modification due October 13, 2022
- Appreciation extended to members for their commitment and work

Subcommittee Report

Subcommittee 1

Debra Kurita shared the following updates for Subcommittee 1:

- Meeting was held on October 5, 2022
They discussed three issues:

- **Issue #61226** *Update Services on where is my refund* was reviewed by Systemic Advocacy (SA) and the Attorney Advisors (AA). Subcommittee 1 recommended this referral be forwarded to the Joint Committee (JC).
Lillie motioned and Kurita seconded
Decision: Full Committee Consensus to forward Issue #61226 to the Joint Committee
- **Issue #59168** *Extended Hours for Customer Service Representatives* was reviewed by SA and the AA. Subcommittee 1 recommended this referral be forward to the JC.
Lillie motioned and Kurita seconded
Decision: Full Committee Consensus to forward Issue #59168 to the Joint Committee
- **Issue #60890** *Testing IRS Web Box* Subcommittee 1 and 2 have completed and recommended the issue is ready for Full Committee's approval
- **Issue #62716** *Telephone Contact from ID.me*. Subcommittee 1 requested a SME to come to their next meeting to answer questions
- Subcommittee 1 will have their next meeting on November 2, 2022

Subcommittee 2

Rodriguez shared the following updates:

- Subcommittee 2 met on October 4, 2022
- The response for **Issue #55354** was accepted and Subcommittee 2 recommendation is to close this issue
Lillie motioned and Robin Mosley seconded
Decision: Full Committee Consensus to close Issue #55354
- Subcommittee 2 has completed work with Subcommittee 1 on **Issue #60890** *Testing IRS Web Bot* the recommendation is to forward this issue to the JC
Kurita motioned and Lillie seconded
Decision: Full Committee Consensus to forward Issue #60890 to the Joint Committee
- Subcommittee 2 started their review on **Issue #52598** and decided to move forward with this issue
- Subcommittee 2 will have their next monthly meeting on November 1, 2022

Screening Committee Report

Robin Mosley shared the following updates for the Screening Committee:

- The Screening Committee's next meeting is scheduled for October 12, 2022. Rosalind Matherne will send a calendar invite to the committee



Internal Communications Committee (ICC)

Angela Madison shared the following updates for ICC:

- ICC members have completed the review and revision of the TAP Handbook
- Madison expressed appreciation and thanks to everyone who assisted ICC in the process
- Matthew O'Sullivan will be missed working with ICC
- Rodriguez thanked TAP for all their dedication and hard work

Outreach

Jon Ramirez provided the following updates for the Outreach Committee

- Members were encouraged to make sure their Activity Reports are accurate. Ramirez noticed some missing information on some of the reports. They did not have information on what type of group, presentation, organization, audience size, what was the interaction, who was the person or persons spoken to. How are we interacting with the public?
- Members were asked if they had any Outreach Activities to share with the committee
- Lillie stated he will be attending an Outreach event in Las Vegas and in New Orleans. David Newingham will be attending as well
- George Williams shared he has a meeting with his LTA on Saturday at a church function
- Ramirez stated an email will be sent to members as a reminder to complete and submit their Activity Reports on time
- Jimerson reminded members to contact Matherne if they are in need of TAP Speak-Up Brochures and they will be mailed directly to them. Williams requested some be sent to him

Action Items

Matherne shared the following Action items:

- Forward TFPL September 13, 2022 approved minutes to Kevin Brown for posting
- **Issue #61226, Issue #59168 and Issue #60890** will be forwarded to Matthew O'Sullivan to be placed on the JC's agenda
- **Issue #54354** will be closed
- Follow-up on the request for a SME to attend Subcommittees 1 2 meetings
- Send a calendar invite to members of the Screening Committee
- Send Speak-Up brochures to members who have requested them
- Send reminder there is one more scheduled Full Committee meeting remaining for the year
- Rodriguez encouraged members to send any questions to Matherne to share with the SMEs prior to their Subcommittee meetings



Roundtable

Ramirez asked each member if they had any comments

- Williams informed the members their next Full Committee meeting will be on November 8, 2022. That is Election Day, and he will be working the polls. Ramirez and Mosley also stated they will be working at the polls. Rodrigues will send a message with an update on the meeting for November
- Lillie shared appreciation to members that it has been a pleasure working with everyone. He encouraged members to continue the excitement
- Jimerson and Matherne thanked everyone and congratulated Donna Burris on her third year with TAP. Members were reminded and encouraged to attend the final meeting for the TAP year
- Martha Lewis reminded members the Chair Report comes from Rodriguez but it is a team effort that reflects TFPL. She shared how TFPL has done a good job and how their meetings ran smoothly Jimerson and Matherne expressed appreciation and thanks to all the members who participated in today's meeting

Close

Meeting was officially closed at 3:49 PM EDT

**Next Meeting: Tuesday, November 8, 2022
3:00 PM EDT, 2:00 PM CDT, 1:00 PM MDT, 12:00 PM PDT**