



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, November 8, 2022**

Designated Federal Officer (DFO)

- Susan Jimerson TAP West Chief

Attendance

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| • 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

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| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Conchata Holloway | 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:

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- This is the last meeting for TAP year 2022
- Returning members were reminded that the work is not done. Outreach continues after the last committee meeting with reporting the information. This is very important. Work is being done on the Annual report, so it is important to continue to update the activity records
- The 2023 Committee Preference email was forwarded to members yesterday, November 7, 2022. Members were encouraged to select their top three committees preferred for TAP year 2023 to work on. The deadline for responses is November 18, 2022. Members were advised a “no response” will mean being placed where needed. Members who may have questions were encouraged to reach out to Jimerson by telephone or email
- Members were reminded November 11, 2022, is Veterans’ Day. Thank you for your service was expressed to members who are Veterans. The TAP Staff will be unavailable on that day in observance of the holiday
- Internal Communications Committee (ICC) will have their final committee meeting on November 15, 2022, beginning at 2:00 PM EDT
- The Ad Hoc Chair meeting begins at 2:30 PM EDT on November 16, 2023.
- The Outreach Committee will have their final meeting on November 17, 2022 at 12:00 PM EDT
- The Joint Committee will have their final meeting on November 17, 2022, at 1:30 PM EDT
- The TAP Graduation Ceremony will be held on November 18, 2022, at 12:00 PM EDT
- Congratulations to Donna Burris on her upcoming graduation
- Members were encouraged to attend the graduation for all TAP retiring members

National Office

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

- Members were commended for their dedication and hard work done during the year
- An email with an attached flyer was sent to members to share with anyone who may be interested in applying for a career position with IRS
- Returning members were encouraged to continue doing Outreach through December

Chair Report

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

- Congratulations and thank you expressed to Donna Patterson for serving three years with TAP.
- There are a couple of issue referrals that needs to be placed in the Parking Lot. The referrals were discussed during the Subcommittees meeting. A response was received back on one of the referrals. Issues that have not been sent to the Joint Committee: Issue #62716, Telephone Contact for Identity Thief Issue Referral and the second one is Issue #52598 Identity Assurance. Additional work will be done on both Issues.
Debra Kurita motioned and Eugene Lillie seconded
Decision: Full Committee Consensus to place Issue #62716 and Issue 52598 in the Parking Lot to be worked next year
- The referral information received back was on Issue #57616, Certified Acceptance Program Modification. The IRS responded with recommendations but did not choose to adopt. The committee's recommendation was to move this to the Parking Lot for next year's TFPL Committee would like to adopt or accept respond from IRS.
Kurita motioned and Anthony Earwood seconded
Decision: Full Committee Consensus to place this Issue #57616 in the Parking Lot to determine a response
- Rodriguez thanked members for all they do and for being available. The Outreach will continue as he and members move into their next role. He shared encouragement for the future to pick up and move forward

Minutes Approval

The TFPL October 11, 2022, Meeting Minutes were approved as submitted. George Williams motioned to approve the minutes and Robin Mosley seconded.

Member of Public

Donna Tuke from Chicago thanked members for the opportunity to sit in on the meeting. She added the work being done is valuable.

Program Owner's Report

James Bellinger shared the following:

- W&I is still working on some of the outstanding referrals
- Appreciation was expressed to members and W&I values the work being done
- He is looking forwarding to working with the committee next year

Subcommittee Report

Subcommittee 1

Debra Kurita shared the following updates for **Subcommittee 1** and

Subcommittee 2:

- Both Subcommittees 1 and 2 had a joint meeting on November 1, 2022
- The Subject Matter Expert (SME) from Privacy Governmental Liaison and Disclosure (PGLD) made a presentation on the two Issues both subcommittees were working and placed in the Parking Lot: Issue #62716, Telephone Contact from Subcommittee 1 and Issue #52598, Login.gov and ID.ME from Subcommittee 2
- Issue #57616, Certified Acceptance Program Modification has been moved to the Parking Lot
- The subcommittee will have issues to work beginning next year
- Kurita expressed her and April Smith's thanks to the members. They are looking forward to working with the committee next year

Internal Communications Committee (ICC)

Angela Madison shared the following updates for ICC:

- ICC will have their meeting next week. It will be their last meeting for the year
- The Handbook review has been completed. It will be forwarded to Matthew O'Sullivan as soon as possible. It will be ongoing into next year and will be on www.ImproveIRS.org
- A Social media post is still being planned. A meeting with Victoria and Rebecca is being planned.
- Thank you expressed to Donna Tuke for joining the call
- O'Sullivan added to share a copy with Susan Jimerson and Rosalind Matherne when sending to him
- The biggest focus is to stay engaged with the public during the off season
- Rodriguez expressed thank you to Madison for an outstanding job with ICC

Outreach

Rodriguez shared the following updates for the Outreach Committee

- According to the Annual Report from last year, TFPL members performed over one thousand hours of Outreach last year. Those members met with people, came up with ideas, researched, pulled together, and made recommendations to IRS. They met with small businesses, large businesses, civic groups, LTAs, VITA, attended social events and worked on social media TFPL was able to pull together multiple referrals and issues. Over the last year they decided on a number of them. Through it all, decisions were vetted and well researched being true to the people served.
- Members were encouraged to continue doing Outreach



- Congratulations to the graduates. Thank you was expressed to Donna for all she has done in the last three years. Rodriguez will share more during the graduation ceremony for Donna

Action Items

Matherne shared the following Action items:

- Forward TFPL October 11, 2022, approved minutes to Kevin Brown for posting
- Place Issues #62716, #52598, and #57616 in the Parking Lot

Roundtable

Rodriguez asked each member if they had any comments

- Overview of what TAP committees' procedures shared for public knowledge: subcommittees work the issues, they talk it out, they clean up the document with recommendations, then they forward to the Full Committee for review. The Full Committee makes the motion forward to the Joint Committee to adopt or send back for edits then send back to them before sending to IRS. There are different types of issues whether they affect individuals, businesses, programs from IRS that are not working for people. Part of this is the Outreach and the Screening Committee. Outreach go out and talk with people, listen to what they say and focus on the problem. During the subcommittee meetings, members discuss and talk things through and push things out. The Full Committee meetings is where members pull together.
- Kurita – thank you to everyone and Rosalind for all the staff support.
- Matherne – thanked all the members
- Earwood – participating in an all-day event with several hundred people attending. He would like to have some Speak Up Brochures sent to him for this event
- Lillie – Members reminded to respond to the email asking for next year's committee preference. He shared encouragement to the returning members to sign up to become a mentor to the new members coming on board next year. He thanked the TAP Staff for their support to the members. To the retiring member he encouraged them to consider being an ambassador for TAP
- Martha Lewis – expressed appreciation to the committee members for a fantastic job. She attended most of the committee meetings. Members worked well as a team. She encouraged members to send in their preferences for next year. She encouraged support for the graduating members and thank you to all for supporting her as the National Chair
- Rodriguez thanked members for all they have done. There will be one more Joint Committee meeting this year, where he will represent TFPL
- George Williams added misinformation about the IRS is circulating. Encouraged developing a way to get the word out about the IRS hiring



Jimerson expressed appreciation and thank you to the Full Committee for all their work and dedication. Thank you to Donna Tuke for attending.

Close

The meeting was officially closed at 3:42 PM EDT

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

Happy Thanksgiving to all