



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, April 13, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- Anthony Earwood San Antonio, TX Member
- Debra Kurita Fullerton, CA Chair
- Eugene Lillie West Deptford, NJ N.Chair/Member
- Robin Mosley Centerville, OH Member
- Jon Ramirez Maize, KS Member
- Richard Rodriguez Stockton, CA Vice Chair

Members Absent

- Angela Madison Los Angeles, CA N.V-Chair/Member
- Charles Slaney Wilsonville, OR Member
- April Smith Birmingham, AL Member
- George Williams Ridgeland, MS Member

Staff

- Frank Bustos Acting, TAP Director
- Rosalind Matherne TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Hannah Jair TAP Program Analyst
- Matthew O'Sullivan TAP Program Analyst
- Annie Gold TAP Administrative Assistant
- Mejbeen Balsara Wage & Investment Liaison

Roll Call

Annie Gold did the roll call.

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided.

National Office Update



Frank Bustos greeted members and welcomed everyone to the call. He stated the following was brought to his attention by Erin Collins, National Taxpayer Advocate (NTA). She wants members to know how important they are to the entire income tax planning for our country. Some of the recommendations submitted by TAP have made some fantastic impacts.

- Members were reminded they are held to a higher standard than normal Taxpayers
- TAP members represent their states as representative of the TAP panel
- The deadline to file is approaching. Members were encouraged to file taxes timely
- If needed, file for an extension remember this is not a waiver to not pay the tax and taxes are still required to be paid timely
- If anyone hasn't filed taxes in the past three years and have a filing requirement, make sure to do so as soon as possible
- Compliance checks have been ordered and are ready for each member of TAP. Reports will be sent to Bustos withing the next week. If anyone has a requirement from the last ten years and have not paid, members were encouraged to file an extension or arrange an Installment Agreement
- Any taxes owed and not in an arrangement stage, or penalties paid make sure to work something out with IRS to get on a payment plan or installment agreement. His expectation is to make sure no member of TAP will be lost due to non-compliance
- TAP members will be traveling to Washington, DC next month. There will be some great guest speakers invited for Wednesday, May 17, 2023 when the full panel will be available. The strategic operational plan has been rolled out. This will give members the opportunity to understand how they will be affected, how they will be proceeding as functions of the IRS. It may help in being more strategic in making referrals and recommendations that will come out of TAP for the future. Due to some members will not be able to make the start time. The start time has been pushed back to 2:00 PM, EST on May 15, 2023. It will continue until 5:00 PM, EST.
- Monday and Tuesday the panel will be doing a lot of work. There will be breakouts for the subcommittees to get some work completed. A lot of work not done at the beginning of the year, there will be some extended committee meetings and training that is applicable for the new members. Bustos is excited to have some of the more experienced members to deliver some of the training.
- Annie Gold will be reaching out to each member to arrange travel reservations. The hotels will not run the credit cards until check-in. Training on how to get reimbursed will be held within the next seven days
- Bustos will reach out to Gold and Kevin Brown to get the date and time arranged for travel training for each member. The training will provide

- information on getting reimbursed timely and what will be needed to get the reimbursements process as quickly as possible.
- For lunch there will be menus floating around. Although we will not be able to leave the building, members were encouraged to bring cash to make things easier. The Staff will go down and pay for the lunches and bring change back to the members needing change back
 - Member with questions were encouraged to reach out to Bustos or let Susan Jimerson or Cedric Jeans know.
 - He is looking forward to seeing everyone next month

DFO Report

- April 18, 2023, the Internal Communications Committee will have their first meeting beginning at 12:00 PM, EST
- The Joint Committee will have their first meeting on April 26, 2023, beginning at 2:00 PM, EST and is lead by Dr. Eugene Lillie. The meeting will last about 1.5 hours
- There will be more information on the Outreach Committee meeting that has not been scheduled as of today. Fred Smith will share more information on Outreach later
- Jimerson encouraged members to contact Annie Gold at (346) 227-6784 with any questions pertaining to travel. She will be able to answer and assist with travel. Her hours are 8:00 AM, CST until 4:30 PM, CST

Chair Report

Debra Kurita thanked members for participating in the two subcommittee meetings held on last week. There were a lot of good discussions.

- Thank you expressed to George Williams and Jon Ramirez for volunteering to be leads of the subcommittees. Anthony Earwood volunteered to assist Williams as part of that process
- Kurita expressed appreciation to The National TAP Chair, Eugene Lillie and Vice Chair, Angela Madison for being a member of TFPL
- Thankful to have Richard Rodriguez on the committee
- The first Joint Committee will be held next month. Kurita will be reporting back with what happened at the meeting
- The Screening Committee is in the process of scheduling their meeting. April Smith, Earwood, Rodriguez, and Williams were advised to look for an email message with the information
- Kurita is looking forward to meeting everyone at the FTF meeting next month
- An email was sent to members on the need for a couple of volunteers for the ICC committee. Earwood volunteered to participate on the ICC.
- Volunteers needed to assist with the monthly reports. Robin Mosley volunteered May



- Matthew O'Sullivan added the first Newsletter is published May 5, 2023 and is called the May Newsletter. The second Newsletter is published June 5, 2023 and is called the June Newsletter. Thank you, Earwood for joining the ICC. Rosalind will share his contact information with O'Sullivan

Member of Public

N/A

Subcommittee Report

Subcommittee 1

Ramirez stated Subcommittee 1 discussed three different issues:

- Issue #61226, Where Is My Refund recommendations were made to IRS. Subcommittee 1 is waiting for further response from IRS
- Issue #66342, Feedback for Voice Bot and Chat Bot. W&I is asking for feedback on other projects
- Issue #52598, Login.gov IRS change over to ID.ME account, Subcommittee 1 discussing and will have a report on next month
- 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 02, 2022

Subcommittee 2

Matherne shared the following updates:

- Subcommittee 2 met on Wednesday, April 05, 2023
- Issue #57616, Certified Acceptance Agent Program. Subcommittee 2 received the response from IRS. They discussed whether or not to accept the response from IRS. They received a new Issue #66029, Modified Certified Acceptance Agent Program to resolve ID theft issues. Subcommittee recommended accept IRS response to Issue #57616 and work on the new Issue #66029
- Issue #66342, Voice Bot and Chat Bot Project. Subcommittee 2 is excited to begin work on this issue
- Subcommittee will have their meeting next week

Eugene Lillie made the motion to close Issue #57616 and Earwood seconded

Decision: Full Committee Consensus Close Issue #57616



Program Owner Report

Mejbeen Balsara introduced herself and stated she is looking forward to working with the committee.

Outreach

Richard Rodriguez provided the following updates for the Outreach Committee:

- Opened the report for questions about Outreach
- A presentation was shared to show where Outreach information is located
- Members were encouraged to review the Member Guide
- Members advised to record the time they leave their residence traveling to the FTF to the time they return on their Activity Report
- Support to LTA should be documented and the people they meet with while with the LTA. Document all time
- When meeting with the Media or do interviews always ask for their membership or reader ID number. Document the number of followers. This is part of your audience
- Members attending Forums and Expos, even if online, were advised to make sure to document the people they met

Fred Smith shared the following:

- He is the Recruitment and Outreach Analyst
- He agreed with Rodriguez's report. A lot of information in the Member Handbook will be discussed this year. Those are the things that will come up during the meetings
- The Outreach Committee has not had the opportunity to meet. It is comprised of all six Project Committee Vice Chairs. The National Vice Chair and Smith will have a meeting on tomorrow to get an idea of who the Vice Chairs are and some background on each one. They will start to formulate what the committee will look like and form ideas to bring to the meetings.
- All members of TAP are invited to attend the Outreach meetings
- Outreach opportunities have been extended the April 30, 2023. It was extended to allow more wider range for potential volunteers. The past couple of weeks have been trying. This will allow more opportunities to conduct Outreach activities in communities and share what TAP is doing
- Smith sent an email message to all members on last week with information about Outreach. Members were encouraged to reach out to Matherne or Smith for the information
- Members were directed to www.ImproveIRS.org to go onto www.U.S.A.J.O.B.S.gov to complete the application
- Continue to do Outreach. Rodriguez is available. Utilize the resources
- Members with questions were advised to reach out

Internal Communications Committee (ICC)

Rodriguez state ICC will report during next month's meeting.

Action Items

Matherne shared the following Action items:

- Send an email to members on the Screening Committee to find the date that will work for them
- Thank you to Earwood for volunteering for the ICC. Forward his information to O'Sullivan
- Thank you to Mosley for volunteering to do the Newsletter article for May
- Place Issue #61226, Update Services to Where is My Refund on the Agenda for next month for discussion
- Subcommittees will work Issue #66342, Voice Bot and Chat Bot from W&I
- Place Issue #52598 in the Parking Lot
- Close Issue #57616, Certified Acceptance Agent Program Modification and incorporate it into a new referral Issue #66729

Roundtable

Kurita asked each member if they had any comments

- Lillie stated he is looking forward to seeing everyone in DC on next month. Members were encouraged to attend the Face-to-Face (FTF). Members will be receiving a copy of the questions the Service would like a response to. There will be training and other things available to take advantage of. There will be questions on the Form 1099K. Members will be receiving a copy of the questions the Service would like a response to. Members were encouraged to respond and submit their input. There will be SMEs and meetings with members of IRS available at the FTF. There is a tremendous amounts of activities happening. Members were encouraged to attend the different meetings
- Rodriguez added within the last week the Strategic Plan was released with the 2023 IRS budget. It is a great opportunity to make recommendations and the things done are solid, there is a good chance of implementing a lot. It will be a good opportunity to not only do some of the things the Committee wants to do but go back and look at some of the things that were declined due to resources availability
- Ramirez shared information on social media about IRS casualties. He encouraged members to share. He reminded Subcommittee 1 members to attend the meetings and if they are unable to attend, let Matherne or the committee Chair know in advance
- Earwood stated the funds have been allocated to 2030. One of the programs is the computer systems at IRS. This will help TAP looking at some of the referrals to watch and see what kind of systems being put into place, what programs, and where is the biggest impact



Close

Meeting was officially closed at 2:47 PM EDT

Next Meeting: The FTF Meeting in Washington, DC on May 15-18, 2023

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