



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, May 16, 2023**

Designated Federal Officer

- Frank Bustos Acting TAP Director

Attendance

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| <ul style="list-style-type: none"> • Anthony Earwood • Debra Kurita • Eugene Lillie • Robin Mosley • George Williams • Angela Madison • Richard Rodriguez | <ul style="list-style-type: none"> San Antonio, TX Fullerton, CA West Deptford, NJ Centerville, OH Ridgeland, MS Los Angeles, CA Stockton, CA | <ul style="list-style-type: none"> Member Chair N. Chair/Member Member Member N. V-Chair/Member Vice Chair |
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Members Absent

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| <ul style="list-style-type: none"> • Jon Ramirez • Charles Slaney • April Smith | <ul style="list-style-type: none"> Centerville, OH Wilsonville, OR Birmingham, AL | <ul style="list-style-type: none"> Member Member Member |
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Staff

- | | |
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| <ul style="list-style-type: none"> • Kurt Van Matre • Rosalind Matherne • Antoinette Ross • Mejbeen Balsara | <ul style="list-style-type: none"> Acting Executive Director, Systemic Advocacy TAP Program Analyst TAP Program Analyst Wage & Investment Liaison |
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Roll Call

Rosalind Matherne did the roll call.

Quorum

A quorum was met.

Welcome and National Office Report

Frank Bustos opened the meeting and welcomed everyone to the call. An overview of the agenda was provided with the following DFO updates:

- He thanked everyone for attending the annual face-to-face meeting.



- TCC, TF&P and TFPL will attend the meeting the first half of the week and SP, NCC and TAC will attend the second half with Wednesday, May 17, 2023, being the “overlap” day.
- He listed the many speakers scheduled for May 17, 2023
- Members who do not have access to Microsoft TEAMS can participate by calling the telephone number that was provided in the invite for the audio portion
- Members were asked to mute their microphones when not speaking during the call. Pressing *6 to mute and *6 again to unmute. This helps to block some of the background noise
- Members having questions were encouraged to use the raised hand option in TEAMS

Chair Report

Debra Kurita welcomed members to the meeting and gave an update of what the screening committee worked on. The Committee closed 75 issues, Parking Lot issues: #64870; #63776; #62577; #62473.

Member of Public

N/A

Subcommittee Report

Subcommittee 1

Jon Ramirez attempted to join by phone earlier but because of technical difficulties could not join. Robin Mosley reported out for subcommittee 1 as follows:

- Parking Lot - Issue #52598, Login.gov IRS change over to ID.ME account,
- Parking Lot - Issue #61226, Where Is My Refund recommendations were made to IRS.
- Issue #66342, Feedback for Voicebot and Chatbot. W&I is asking for feedback on other projects

Subcommittee 2

George Williams reported that Subcommittee 2 is considering working on the following issues:

Issue 61907 - Dashboard Data for Where's My Refund?

Issue 62716 – Identity Theft Issue

Issue 63776 – Reissuance of Refund Checks

Issue 64760 – Enhancing and Advertising TAS Problem Solving Days

Issue 74870 – Boston Office Fax Number



Issue 66274 – On-hold Music
Issue 67028 – Generating Metrics

Program Owner Report

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

Outreach and Internal Communications Committee (ICC)

Richard Rodriguez provided the following updates for the Outreach Committee:

- Opened the report for questions about Outreach
- Please send out TAP information on Facebook
- Use the Facebook page with the 20th anniversary log
- This is a great opportunity for growth. If you have communities, you want to reach using your “Speak Up” Brochure in different languages that is being worked on with the ICC.
- The issue regarding ICC ImproveIRS.org issue will be sent back to the TFPL committee. Working on a website update regarding better visibility for people.
- Talked about social media and the Speak Up brochure.

Action Items

Matherne shared the following Action item:

- Close 75 Issues from the Screening Report

Roundtable

Kurita asked each member if they had any comments

- Lillie spoke about outreach at a local high school; writing a curriculum for high schools regarding TAP outreach; He will report back regarding his findings regarding this issue
- Earwood spoke about the new Speak Up brochure pamphlet.
- Williams stated that the IRS has been very helpful during this face-to-face meeting.
- Rodriguez thanked the Acting TAP Director for bringing the TAP members together as a group.

Close

Bustos thanked everyone and commented that he was happy to see the ideas that came out of the meeting are great. Meeting was officially closed at 2:41_PM_ET

The Next TFPL Full Committee Meeting: June 8, 2023

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