



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, June 8, 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 |
| • Angela Madison | Los Angeles, CA | N. V-Chair/Member |
| • Robin Mosley | Centerville, OH | Member |
| • Richard Rodriguez | Stockton, CA | Vice Chair |
| • Charles Slaney | Wilsonville, OR | Member |
| • April Smith | Birmingham, AL | Member |
| • George Williams | Ridgeland, MS | Member |

Members Absent

- Jon Ramirez Maize, KS Member

Staff

- | | |
|---------------------|--|
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Hannah Jair | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | Wage & Investment Customer Service (W&I) |

Quorum

A quorum was met.

Welcome

Rosalind Matherne opened the meeting and welcomed everyone to the call. An overview of the agenda was provided. Frank Bustos could not be on the call.

Susan Jimerson provided the following DFO updates:

- June 20, 2023, ICC will have their monthly meeting beginning at 12:00 PM ET
- June 21, 2023, Outreach meeting will begin at 11:00 AM ET



- Members were encouraged to submit all time spent traveling from home and back to TAP's Annual Meeting in Washington, DC on their Activity Report which counts as Outreach hours
- June 26, 2023, the Joint Committee meeting will begin at 3:00 PM ET. The National Office Chair, Eugene Lillie; Vice Chair, Angela Madison and the Project Committee Chairs will be in attendance
- Thank you expressed to all members who participated in TAP's Annual Meeting.

Chair Report

Debra Kurita welcomed and thanked members for being on the call. Thank you to management and staff for all the work they did to bring everything together for the very successful face-to-face (FTF) meeting.

- The question was asked if the survey had closed. Conchata Holloway will follow up on the status. Members were encouraged to provide their feedback to make the FTF even better for the next time
- The FTF was very productive. A total of 75 issues were closed, 17 issues were followed-up on for Subcommittee 1 and Subcommittee 2
- Subcommittee 1 will be joining Subcommittee 2 on July 5, 2023, because of the Independence Day holiday.
- Kurita will be contacting some of the Chairs for coordination in efforts
- The Screening Committee meeting will be held next week. It should be a much easier task with some of the issues already sorted out.
- Thank you to Robin Mosley for volunteering for the Newsletter for June. Volunteers are still needed for August and October. Kurita volunteered to do the next submission
- Members were encouraged to do their Activity Reports. Make sure to select TFPL when completing the report for all the Outreach and activities and all the meetings attended
- Thank you to all members for their participations and have a safe holiday

Minutes Approval

The TFPL Meeting Minutes for March 30, 2023, and April 13, 2023, were approved.

Richard Rodriguez made the motion and Mosley seconded May 16, 2023, minutes will be carried over to next month

Public Comment

None



Subcommittee Report

Subcommittee 1

Robin Mosley stated Subcommittee 1 met on June 6, 2023. They discussed six possible issues to review. A SME was requested for five issues from the Transformation and Strategic Office to provide a briefing of ongoing and future issues IRS is working regarding phone, upgrades, call back features for customer service phone lines and postings of center metrics for public view. Subcommittee 1 and Subcommittee 2 will meet with the SME.

- Issue #57057, Website and Email Addresses Subcommittee 1 agreed to transfer this issue to TAC Subcommittee to associate with their Issue #41122, Accessibility to TAC Offices
- Issue #57970, IRS Need to Improve Making TAC Appointments and Address the Non-Availability of IRS Personnel. Subcommittee 1 agreed to turn this issue over to TAC Subcommittee
- Kurita added Subcommittee 1 has been asked to submit questions on the items they would like on the Transformation and Strategic committee and similar request will be sent to Subcommittee 2

Subcommittee 2

George Williams stated Subcommittee 2 met on June 07, 2023, and had discussions on seven issues:

- Issue #61907, Where Is My Refund, Subcommittee determined further discussions with other committees would be needed before any further engagement
- Issue #62716, ID Theft Issues, Subcommittee 2 agreed to seek further guidance from a SME before proceeding
- Refund Checks, Subcommittee 2 had a question on whether or not IRS would have the ability to issue a returned check as an electronic payment was discussed, and it was decided to seek further information and allow the Chairs to discuss some issues raised by Kurita
- Issue #64760, Enhancing and Advertising TAS Problem Solving, Matherne agreed to research the issue and report back to the subcommittee. Williams will meet with his LTA for additional information
- Issue #64870, Boston Office Fax Number, Matherne will address this issue with the subcommittee
- Issue #66274, On Hold Music, Lillie agreed to take this for action and when was the last time the music was changed. One question asked was could the time be best used for public service announcements. Matherne agreed to research and get back with the subcommittee
- Issue #67028, The Right to Quality Service on the Phone Line The subcommittee members would like to review the surveys referred to in the Data Book on the IRS website. Matherne will request this information



- Overseas Taxpayers were discussed during the roundtable. Lillie provided some information. They do not have access to a toll-free phone line to address their issue to the IRS.
- Kurita added Mosely will send the ability to add follow up questions to Issues: 61907, 63776, 67028. Any questions can be added to the list. Mosley asked if the questions should be sent to Williams

Program Owners Report

Matherne stated Balsara Mejbeen shared the following report: Issue #66342, The Voicebot and Chatbot project is postponed until next year. This issue will be closed

Outreach

Richard Rodrigues stated the Outreach Committee did not have their meeting. He shared some previous information:

- Members were reminded and encouraged to log onto www.TAPSpace.org under the tab for resources is the TAP Member Guide. There members will find out how to record the Activity report
- Any questions do not hesitate to reach out to Rodriguez
- Matherne reminded members to copy the TAP mailbox and send a copy to Jimerson, and Matherne

Internal Communications

Rodriguez stated the ICC

- Members were reminded when sending messages to include in the subject line: **2023-TFPL-TOPIC** this helps in tracking
- ICC is working on several things: They finalized the initial piece for the Speak Up pamphlet. A copy was sent to IRS for the markup and review of the final product is anticipated during the June meeting and ready for the Joint Committee
- Work will be begin on www.TAPSpace.org in July
- Information will be shared with members for their availability and feedback

Action Items

Matherne will do the following:

- Contact IT for information regarding Microsoft TEAMS meeting problems
- Close Issue #66342 Voicebot and Chatbot project
- Send invite to members for Subcommittees for July meeting
- Debra Kurita will submit the Newsletter article for the month and asked for volunteers for future submissions
- Forward the approved Minutes to Kevin Brown for posting
- Conduct research and request a SME regarding the Strategic Operating Plan



Roundtable

- Lillie shared updates on information he received regarding the issue of overseas phone lines. Lillie asked if members would share their reimbursement status for the FTF meeting.
- Angela Madison added Outreach, Outreach, Outreach.
- Jimerson added Annie Gold and Kevin Brown are completing the travel vouchers. All documentation is needed to accurately complete and process the reimbursements

Thank you to members for joined the call.

Close

Meeting was officially closed at 2:51 PM ET

Next Meeting: Thursday, July 13, 2023

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