



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, July 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 |
| • 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 |
| • Jantel VanOrden | Salt Lake City, Utah | Member |
| • George Williams | Ridgeland, MS | Member |

Members Absent

- Jon Ramirez Maize, KS Member

Staff

- | | |
|---------------------|------------------------------|
| • Frank Bustos | TAP Acting Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Hannah Jair | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | 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.

- July 17, 2023, Joint Committee will have their monthly meeting beginning at 3:00 PM ET
- July 18, 2023, ICC monthly meeting beginning at 12:00 PM ET
- July 19, 2023, Outreach meeting will begin at 11:00 AM ET
- July 24, 2023, Joint Committee meeting will be held at 3:00 PM ET



- Jimerson expressed appreciation and welcomed Jantel VanOrden to the Committee. VanOrden was encouraged to reach out to Jimerson with questions or to Rosalind Matherne, the Analyst for TFPL Committee for assistance.

National Office Update

Frank Bustos welcomed everyone to the call. Congratulations, thank you and welcome remarks to Jantel VanOrden from Utah.

- Members participating in the New Orleans Tax Forum were acknowledged and congratulated in their efforts. Rita Green shared a play by play of how things were going in New Orleans
- Thank you expressed to Eugene Lillie for his representation and participation at the Tax Forums. Lillie will be providing sharing feedback on what the speakers are delivering. He will also be providing materials from the forums with the members. Bustos will reach out to some of the speakers during the forums to try and get them to join TAP Committee calls. Members who will be participating in the forums were encouraged to share some of the messages presented with the committees
- As part of the Inflation Reduction Act, IRS will provide a report to Congress on the Direct E-File program. The pilot program is scheduled to begin next year in 2024.
- Bustos is looking forward to great work from this committee
- Bustos had the opportunity to be involved in some discussion with the Australian Department of Revenue and with an individual who interviewed for the panel last week from Singapore.
- Bustos expressed his appreciation for the opportunity during his detailed assignment as Acting TAP Director. He looks forward to sitting in on future meetings as a member of the public

Chair Report

Debra Kurita expressed her thanks and appreciation to Bustos for six months of serving as Director and best wishes. Welcome to Orden as TFPL Committee member.

- The feature for entering hours on the Activity Report has been resolved. Members were reminded to add TFPL Committee when entering Outreach activities.
- The Screening Committee will have their meeting on July 20, 2023



Minutes Approval

The TFPL Meeting Minutes were approved for:

May 16, 2023, Eugene Lillie motioned, and Richard Rodriguez seconded

June 8, 2023, Lillie motioned, and Anthony Earwood seconded

Public Comment

None

Subcommittee Report

Subcommittee 1

Robin Mosley stated Subcommittee 1 had three issues to discuss:

- Issue #55356, *Online Chat Feature* the subcommittee is waiting on additional information before deciding to work or close this issue.
- Issue #63808, *Routing of TAS Line*, this issue will not be worked, and the subcommittee agreed to close this issue.
- Issue # 57057, *Phone Number Systems* and #57970, *the Taxpayer Assistance Center (TAC) hotline* will be assigned to TAC.

Subcommittee 2

George Williams stated Subcommittee 2 is working on several issues:

- Issue #61907, *Where Is My Refund*, Lillie sent a draft referral to TFPL members, and the subcommittee decided to continue working on it
- Issue #62716, *Telephone Contact for ID Theft Issues*, Lillie sent a draft referral to TFPL members, and the subcommittee decided to continue working on it
- Issue #66274, *On Hold Music*, Lillie is drafting this referral.
- Issue #67028, *The Right to Quality Service on the Phone Line*, Matherne provided information and members were encouraged to review it.
- Issue #64760, *Enhancing and Advertising TAS Problem Solving*, Williams and Madison will work on this referral.

Mosely motioned and Williams seconded.

Decision: Full Committee Consensus approve to close Issue 63808, and transfer Issues #57057 and #57970 to TAC

Program Owners Report

Mejbeen Balsara stated there were no updates at this time. Rodriguez asked when will the surveys be available. Balsara stated she is working on it and referred Rodriguez to research the website.

Outreach

Rodriguez stated the Outreach Committee shared some the following information:



- Members were reminded when doing Outreach events, there are tablecloths available. Reach out to Kevin Brown, Fred Smith or Matherne for supplies needed. Allow them one to two weeks to get supplies to you
- The National Taxpayer Forums have started. Thank you to members participating
- Members were reminded to update their Activity Reports and reach out if there are problems.
- Madison reminded members to copy all three; Lammers, Rodriguez, and Madison when sending information. They are trying to put more content into the postings for additional public comments. Outreach, Outreach Outreach -- it is critical that Outreach be done and critical to be active.
- Lillie added he will be participating at the Problem-Solving Day event with his LTA and the local Congressman on July 25, 2023. Members were encouraged to check with their LTA and local elected officials for events. Members were reminded the Nationwide Tax Forums are taking place. This will be a great opportunity for Outreach. There will be more than five thousand practitioners at each site with a lot of information and suggestions.
- The volunteer that was schedule to attend the Tax Forum in Atlanta is unable to attend. Members were advised to contact Lillie if they are interested in participating in the Tax Forum in Atlanta and are in commuting distance. Keep in mind, there is no budget for travel

Internal Communications

Rodriguez stated the ICC

- The Speak Up brochures are completed and at the printer. Members should be receiving copies soon. They will be going out to participants at the Tax Forums first
- Work is being done on www.TAPSpace.org and there will be a meeting on it at the next ICC meeting. A SME will be attending. Direct any questions to Rodriguez
- They are working on a referral database. The plan is to work backwards with the Annual Reports created the last two years, create a spreadsheet, and pull out the recommendations and responses for references
- Members were asked if they receive any benefits with the Newsletter in its current format. Submit comments, responses, and recommendations to Rodriguez
- Matherne mentioned members are able to find issues and recommendation on www.ImproveIRS.org

Action Items

Matherne will do the following:

- Close Issue #66380 and reassign Issues #57057 and 57970 to TAC committee



- Forward the TFPL May 16, 2023, and June 08, 2023, to Kevin Brown for posting
- Work with Balsara on getting copies of the surveys.
- Volunteers are needed to write the TFPL Newsletter article. Kurita said she will do it since no one volunteered.

Roundtable

- Lillie encouraged members to stay focused. TFPL is one of the most active, well attended and one of the most productive committees. Members are doing a tremendous job. He stated members must stay focused and get the job done. The Bylaws will be reviewed for things to be added, changed, and amended. Members were encouraged to attend the meeting when it is scheduled
- Kurita stated VanOrden will be added to Subcommittee 1 and Matherne will add her name to the calendar invite for the Subcommittee 1 meeting. Bustos added the Joint Committee meeting will be held on July 17, 2023, and she is invited to attend

Jimerson thanked everyone for attending the call.

Close

Meeting was officially closed at 2:59 PM ET

Next Meeting: Thursday, August 14, 2023

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