



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, August 10, 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 National TAP
Chair & Member
- Angela Madison Los Angeles, CA National TAP Vice
Chair & Member
- Robin Mosley Centerville, OH Member
- Jon Ramirez Maize, KS Member
- Richard Rodriguez Stockton, CA Vice Chair
- Charles Slaney Wilsonville, OR Member
- George Williams Ridgeland, MS Member

Members Absent

- April Smith Birmingham, AL Member
- Jantel VanOrden Utah Member

Staff

- Cedric Jeans TAP Acting 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

Quorum

A quorum was met.

Welcome

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

- August 15, 2023, ICC monthly meeting beginning at 12:00 PM, ET
- August 16, 2023, Outreach meeting will begin at 11:00 AM, ET
- August 28, 2023, Joint Committee meeting will be held at 3:00 PM, ET
- Hannah Jair is leaving on Friday. Matthew O’Sullivan will be the Analyst covering ICC. Conchata Holloway will be the Analyst covering the Joint Committee and she will continue to be the Analyst for TCC



National Office Update

Cedric Jeans welcomed everyone to the call and shared the following National Office updates:

- There have been some staffing changes; Frank Bustos has gone back to his position with the Low-Income Tax Clinic (LITC). Jeans will be Acting TAP Director until a permanent Director has been selected. Robert Rosalia will be Acting TAP East Manager
- There will be opportunities to contribute to the National Taxpayer Advocate (NTA), Erin Collins' Most Serious Problems. One is on the International ITIN issue. An email solicitation will be sent for members participation in a focus group on September 7, 2023. Members with questions were encouraged to reach out to Rosalind Matherne or respond to the email.
- The Joint Committee Planning Session will be held at the end of the month on August 29 – 30, 2023. The Chairs of the committees will discuss plans for the 2024 TAP year. Discussions will be held on potential projects, survey results and ways to improve the program. Members were encouraged to share any ideas or thoughts.
- The IRS News Release shared information on the digitalization of many IRS paper documents. Documents will be scanned as soon as they are received. This effort will be pushed forward requiring a lot of manpower hours.
- The TAP year is rounding to the end. Members with any referrals or anything to be included in the Annual Report were encouraged to finalize the documents and send them through the appropriate process.
- There will be an All-TAP Meeting scheduled around the first part of September. A notification will be sent to all members shortly. Information will be shared during the meeting on some IRS news, strategies, things going on within the Service, and TAP business.

Chair Report

Debra Kurita shared the following:

- Members were encouraged to update their Activity Reports with hours for meetings, Outreach and doing research. The total number of combined hours is 1,500.
- The National Tax Forums are in process in DC. Eugene Lillie and Jantel VanOrden are attending the DC Forum. Other meetings will be in San Diego, CA and Orlando, FL
- Matherne sent a request to members asking for input on Issue #57139, Digital Access. Members were encouraged to respond to Matherne by September 9, 2023
- The Screening Committee will have their meeting on August 17, 2023
- Volunteers are needed to submit articles for the Newsletter. Members were encouraged to contact Kurita.
- Member input is needed during the Roundtable discussion on the monthly Newsletter. Comments on the need for changes, how it is useful, and any input would be helpful



- Robin Mosley and Kurita would like member input to assist with the project they are working on regarding experiences related to putting together recommendations for the online live chat feature from the website.

Minutes Approval

The TFPL July 13, 2023, Meeting Minutes were approved. Eugene Lillie motioned, and Charles Slaney seconded.

Public Comment

None

Subcommittee Report

Subcommittee 1

Kurita shared the following updates for Subcommittee 1:

- Subcommittee 1 had their monthly meeting on August 1, 2023
- Discussions were held on Issue 52598 - *Login.gov* Matherne was asked to provide additional research.
- Issue 64760 - *Enhancing and Advertising Problem Solving Day*. George Williams and Angela Madison are working this issue.
- Issue 55536 - *Online Live Chat Feature*. The subcommittee is still working this issue.

Subcommittee 2

Williams shared the following updates for Subcommittee 2:

- Subcommittee 2 had their monthly meeting on August 2, 2023
- Discussions were held on Issue 61907 – *Dashboard Data for Where’s My Refund?*; Issue 67028 – *The Right to Quality Service on the Phone Line*; and Issue 66274 - *On Hold Music*. Subcommittee 2 will finish Issue 66274 after the SMEs’ presentation scheduled for next month.
- Lillie expressed congratulations to Williams on his letter of acceptance as a Certified Acceptance Agent.

Program Owners Report

No report for this meeting.

Outreach

Richard Rodriguez stated the Outreach Committee shared some the following information:

- Training for the Facebook post was conducted. Members were encouraged to submit pictures or information to Rebecca Lammers, Angela Madison and Rodriguez.
- Members who attended some of the Tax Forums found some of the forms on www.TAPSpace.org were outdated.
- Members were reminded to update their Activity Reports and reach out if there are problems
- Lillie shared he had an incredible experience participating in the Tax Forum. Lillie met with individuals from the Taxpayer Experience Office. The questions the



audiences were asking were issues TFPL is working. He met four times with the National Taxpayer Advocate, Erin Collins, twice with Adam Morse and spoke with others from different divisions within the IRS. Lillie has asked individuals if they would come and speak with the committee on what their top issues are. Some referrals could come out of their sharing. A total of 31 will be entered into SAMS. Five will be referrals. There were four seminars on the 1099-K and three on Identity Theft. There was a seminar on recent immigrants. Employees have been put back on processing paper returns. There is a back log of returns. Taxpayer Experience Office stated that the IRS hired the targeted employees to work the telephone hotlines. Lille will complete write-ups once he returns. Members were challenged to generate additional referral topics as they attend the upcoming Tax Forums in Orlando, FL and San Diego, CA.

- Members were encouraged to continue using the SpeakUp brochures currently available until the updated copies have been completed and distributed.

Internal Communications

Rodriguez shared the following ICC updates:

- A review of the documents on the Resource webpage is being conducted by ICC for updated forms
- The current TAP Outreach F-14388 does not have the QR code
- The Facebook training was completed. A calendar was established. Share pictures if available
- ICC will discontinue the efforts of creating a database. Committee members should reach out to the Analyst for reports from SAMS on open referrals or its status.
- Kurita asked to have a report of open items where referrals have been sent and responses.

Action Items

Matherne will do the following:

- Forward the approved TFPL July 13, 2023, meeting minutes to Kevin Brown for posting.
- Complete research for Issue #52598, and report back to the subcommittee
- Work on researching when issues are under consideration and report back to the committee
- Follow up on the two SMEs requested for Subcommittee 2 for September 6, 2023. One will be for 1:00 PM, ET regarding messages on the toll-free phone line and on-hold music, and the other for 1:30 PM, ET regarding identity theft.
- Kurita reminded members to have their questions ready and submitted in advance for the SMEs to respond to. Matherne agreed and requested to receive questions from the members NLT than Friday, August 18, 2023.

Roundtable

Kurita ask if there were any comments or recommendations regarding the content or structure of the TAP Newsletter.



- Kurita – It a useful resource to see what other Committees are working on; it helps to avoid duplicate referrals and encourages the Chairs to work together to ensure that the referrals complement each other and are not contradictory.
- Mosley - Use a consistent format
- Madison - Encourage the use of the template for Newsletter submissions
- Rodriguez – Provide a forward look at items coming in TAP’s direction.

Additionally, the following items were shared during the roundtable discussion:

- Madison added the following:
 - Calendar schedule postings for Facebook has not been shared with Madison and she was not included in the conversation
 - Six pages of content was shared with the Outreach Analyst per timeline promised and asked for assistance on a couple of sections.
 - Outreach, Outreach, Outreach is increasing
- Madison, Kurita, and the LTA will participate in an Outreach event on Saturday, August 12th for five hours during the Senior Resource Day in Buena Park, California where they anticipate 250 residents to attend.
- Members were encouraged to send email to Mosely or Kurita on any thoughts regarding the Live Chat Feature.
- Anthony Earwood will be participating in a SCORE Outreach event in Jacksonville, FL next week. There will be over 400 individuals attending

Jimerson reminded members to continue to use the SpeakUp Brochures on hand until the new updated ones are available.

Close

Meeting was officially closed at 2:48 PM, ET

**Next Meeting: Thursday, September 14, 2023
1:00 PM ET, 12:00 PM CT, 11:00 AM MT, 10:00 AM PT**

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