



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, September 14, 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

- Robin Mosley Centerville, OH Member
- Richard Rodriguez Stockton, CA Vice Chair
- Charles Slaney Wilsonville, OR Member
- George Williams Ridgeland, MS Member

Members Absent

- Angela Madison Los Angeles, CA National TAP Vice
Chair & Member

- Jon Ramirez Maize, KS Member
- April Smith Birmingham, AL Member
- Jantel VanOrden Utah Member

Visiting Member

- Donna Patterson Bothell, WA Member

Staff

- Fred Smith Acting, TAP Acting Director
- Rosalind Matherne TAP Program Analyst
- Conchata Holloway 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.

- September 19, 2023, ICC monthly meeting beginning at 12:00 PM ET



- September 25, 2023, Joint Committee meeting will be held at 3:00 PM ET

National Office Update

Fred Smith welcomed everyone to the call and shared the following National Office updates:

- Members were advised that there will be a Focus Group for Appeals on September 26, 2023, beginning at 2:00 PM ET. Members were encouraged to contact Ann Tabat if interested.
- Members were encouraged to reach out to Jimerson if they are interested in working on the Annual Report.
- TAP Staff will be attending training in Dallas, TX next week. Email responses may be delayed but members were encouraged to continue to reach out for assistance.
- Appreciation expressed to members for having quorum.
- There are only a few remaining meetings for this TAP year. Members were encouraged to continue the good work
- Third year members were encouraged to enter their activity report hours. This will help determine the correct Presidential award level at the end of their term
- The Outreach meeting that was scheduled for September 20, 2023, will be rescheduled. Smith will send an email message with the rescheduled date and time

Chair Report

Debra Kurita shared the following:

- Thank you expressed to April Smith and Charles Slaney. Smith prepared the article for the Newsletter this month. Slaney will do the submission for next month. For the final Newsletter, each member was asked to send Kurita one or two lines with words of wisdom and advice. Responses are due to Kurita by November 15, 2023, which will be included in the newsletter article. Kurita will send a reminder for submissions
- The Joint Committee met several days last month. During the regular meeting there was one referral approved from Taxpayers Communication Committee regarding effectively measuring Outreach. Two days were spent sharing recommendations to improve TAP processes that may be considered next year. TAP staff also introduced the t new and improved process that will be implemented for the election of the National Chair and Vice Chair for 2024.
- Members were encouraged to complete the survey at the end of the year.
- Kurita shared that she participated in the Ad Hoc group for ID Theft and learned valuable information. Members were encouraged to participate in the upcoming Ad Hoc Committee on Appeals by submitting their names by September 22, 2023.



- Members will have the opportunity to submit changes to the By-Laws. Kurita sent an email message to members with the form for the changes which are due by September 25, 2023
- Members were reminded to share their interest in assisting with the Annual Report by September 22, 2023
- Members were encouraged and reminded to complete the Activity Reports

Minutes Approval

The TFPL August 10, 2023, Meeting Minutes were approved with correction. Richard Rodriguez motioned, and Anthony Earwood seconded.

Public Comment

None

Subcommittee Report

Subcommittee 1

Charles Slaney shared the following updates for Subcommittee 1:

- Issue #55536 *Online Chat Feature*, the referral has gone through QR and has been submitted to Systemic Advocacy and the Attorney Advisor for review
- Issue #52598 *Login .gov*, Matherne was asked to provide additional research
- Issue #62577 *Website Feature, Call Times and Metrics* will remain in the Parking Lot

Subcommittee 2

George Williams shared the following for Subcommittee 2:

- Two meetings were held last week: September 6, 2023, SMEs shared information regarding on-hold Music on the 800-telephone line and identity theft prevention and victim assistance. The subcommittee voted and agreed to have a subsequent meeting on September 8, 2023, to address the remaining items on their agenda.

During the second meeting the subcommittee discussed issues being worked:

- The members closed Issue #68793 *Regulating Non-Credentialed Return Preparers*.
- The members closed Issue #68811 *Mailing Address for IRS*.
- Issue #61907 *Dashboard Data for Where's My Refund* is still being worked.
- Issue #67028 *The Right to Customer Service on the Phone Lines* is being worked.
- Issue #66274 *On Hold Music* was elevated to QR, SA and AA.
- Issue #62716 *Identity Theft Prevention and Victim Assistance Measures* was elevated to QR, SA and AA.



Screening Committee Report

Kurita shared the following:

- Several issues that came over the phone lines last month were closed.

Program Owners Report

No report for this meeting.

Outreach

Rodriguez from the Outreach Committee shared the following:

- He attended the recent tax forum Orlando and gave a brief overview of the event. He recommended that at least one member participating in outreach at the National Tax Forums be a tax professional to be able to fully understand issues that the participants ask. He noted that 27 suggestions were generated from the event.
- Members were encouraged to go to different types of schools, including law schools and tax preparations courses, as well as LTAs for possible outreach events.

Earwood stated TAS has a lot of outreach opportunities, and it would benefit members to reach out to TAS to participate at their events.

Jimerson added Problem-Solving Day events are scheduled and members were encouraged to participate.

Lillie shared that he participated in a Problem-Solving Day that was a multifaceted Outreach event six weeks ago. It was sponsored by the local Congressman. It had Housing and Urban Development, Department of Education, Department of Banking all kinds of different resources there. He suggested reaching out to the local Congressional Offices to identify any potential outreach activities.

Rodriguez added Todd Harbor is the Director of all TAC offices and he is on board and wants to be involved with the suggestion made by Cynthia Mills to create a process to evaluate the sites for Taxpayer Experience. The information was passed on to TAP leadership.

Tamikio Bohler added Leslie Henley is the point of contact for W&I when requesting a SME or questions involving the TAC. Members were advised to submit their requests which will be forwarded to Henley who will make sure the right person will be made available.

Internal Communications

Rodriguez stated ICC is working two referrals:



- One is to develop a database to make contact, giving information on attending meetings at every level. Additional information to be shared at next full committee meeting
- ICC is also working on submitting change to VITA Requisition form for their annual facility stand up
- They are closing out reporting on tracking of www.TAPSpace.org and the referral database.

Action Items

Matherne will do the following:

- Forward the approved TFPL August 10, 2023, minutes to Kevin Brown for posting.
- Complete research for Issue #52598 *Login.gov* and report back to the subcommittee
- Elevate to QR Issue #66274 *On Hold Music* and Issue #62716 *Identity Theft Prevention and Victim Assistance Measures*
- Close Issue #68793 *Regulating Non-Credential Return Preparers* and Issue #68811 *Mailing Address for IRS*
- Close issues from the Screening Report

Roundtable

Kurita asked for suggestions and/or comments for the Roundtable:

- Lillie expressed appreciation to members for their efforts and talents brought to the table to complete issues that affect the Taxpayers
- Lillie will do a one-hour presentation on the pros and cons of the 1031 Exchange Program.
- Williams added he was educated on how the program works by the local insurance carrier for the government program. He noted that many people do not understand that if they do not submit Form 1095, their Tax Returns will not be accepted.

Jimerson thanked members for attending the call. There was a lot of good information shared. Members were encouraged to continue the good work.

Close

Meeting was officially closed at 2:47 PM ET

**Next Meeting: Thursday, October 12, 2023
2:00 PM ET, 1:00 PM CT, 12:00 PM MT, 11:00 AM PT**

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