



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, October 12, 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 |
| • Richard Rodriguez | Stockton, CA | Vice Chair |
| • George Williams | Ridgeland, MS | Member |

Members Absent

- | | | |
|-------------------|-----------------|--------|
| • Jon Ramirez | Maize, KS | Member |
| • Charles Slaney | Wilsonville, OR | Member |
| • April Smith | Birmingham, AL | Member |
| • Jantel VanOrden | Utah | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | Wage & Investment |

Quorum

A quorum was met.

Welcome

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

- The Joint Committee will have an additional meeting on November 16, 2023, in lieu of a possible government shutdown. This is to assure the referrals get pushed through.

- October 17, 2023, ICC monthly meeting beginning at 12:00 PM, ET.
- October 18, 2023, Outreach Committee will have their meeting beginning at 11:00 AM, ET.
- October 20, 2023, Annual Report meeting beginning at 12:00 PM, ET.
- October 23, 2023, Joint Committee meeting will be held at 3:00 PM, ET.

National Office Update

Cedric Jeans could not be on the call today.

Chair Report

Debra Kurita shared the following:

- Thank you expressed thank you to the committee with appreciation to Robin Mosley, Charles Slaney and April Smith for their contributions to the newsletter.
- Members were encouraged to enter all activity hours in their Activity report.
- Angela Madison, Kurita and the LTA have participated in three Outreach events and cities over the last several weeks. They have been asked by some of the vendors to come and participate in some of their events
- Conchata Holloway shared information on the TAP Elections scheduled for October 24, 2023
- The By-Laws Committee had their first meeting. There will be a second meeting to begin to review and process the 43 recommendations.
- During the Joint Committee meeting several items were approved to be elevated. There were three items from Notices and Correspondence and one from Taxpayer Assistance Center to allow taxpayers to schedule appointments from kiosks.

Minutes Approval

The TFPL September 14, 2023, Meeting Minutes were approved with correction. Eugene Lillie motioned, and Anthony Earwood seconded.

Public Comment

None

Subcommittee Report

Subcommittee 1

Angela Madison shared the following updates for Subcommittee 1:

- Issue #55536, *Online Chat Feature*, was sent to the committee in the pre-reads. This issue was referred to be elevated to the Joint Committee.
Action: Full Committee consensus to forward Issue #55536 to the Joint Committee for approval motioned by Lille and seconded by Earwood.

Subcommittee 2

- Issue #62716, *Identity Theft Prevention and Victim Assistance Measures*
Jimerson noted that comments from the Attorney Advisor and Systemic Advisory had been recently received on this issue. She added that discussions on these comments need to be held in a Subcommittee 2 meeting. A copy with the AA and SA's comments will be shared with members following this meeting. Lillie motioned to place this issue in the Parking Lot and George Williams seconded the motion.

The team had a robust discussion on the substance and impact of the motion. Matherne reminded the TFPL members that placing the issue in the Parking Lot means it will not be worked on this year. Lillie noted that the committee is running out of time and placing it in the Parking Lot allows the subcommittee to work on the issue in the future.

Actions:

- **Full Committee voted on the motion by Lillie, seconded by Williams, to place the issue in the Subcommittee 2 Parking Lot – motion failed.**
- **Full Committee consensus to assign Issue 62716 back to Subcommittee 2 motioned by Kurita and seconded by Mosley.**

Matherne said that she will identify a time for a joint subcommittee meeting to discuss this item in the next two weeks.

- Issue #66274, *Toll-Free Phone Lines – On Hold Messages* This issue was referred to be elevated to the Joint Committee.

Action: Full Committee consensus to forward Issue #66274 to the Joint Committee for approval motioned by Earwood and seconded by Kurita

- Issue #61907, *Dashboard Data for Where is My Refund* the subcommittee voted to send out to QR for review.
- Issue #64760, *Enhancing and Advertising Problem Solving Days* was voted out of the subcommittee to QR.

Matherne added both issues were forwarded to QR and will go on to SA and the AA for review.

Outreach

Richard Rodriguez stated the Outreach Committee did not have a meeting last month.

- Members were reminded to contact Kevin Brown for any supplies needed in performing Outreach.
- Members were encouraged to enter their hours in the Activity Reports by the end of the year.
- Williams asked for an estimate of the turn-around time to receive supplies. Rodriguez encouraged a three-week notice, if possible. Madison added that when sending the email request, make sure to copy the Taxpayer Advocacy Panel mailbox and the Analyst.
- Thank you to Kurita and Madison for connecting with the LTA and leading the way to continue doing Outreach

Internal Communications

Rodriguez stated ICC will continue to do what is needed to help members be successful in the organization:

- Let ICC know what is needed to break down barriers and any additional resources needed to help support members' needs.
- ICC sent a referral to the Joint Committee about adding items to VITA supply request. Working on the forms to make standardized requests for Speak Up Brochures a part of the VITA locations and the LITC
- Another referral being worked on is one requesting additional Outreach materials to assist members in better communicating with the public.
- ICC is also working on updating the distribution list that appears at the bottom of the www.ImproveIRS.org website.

Action Items

Matherne will do the following:

- Forward the approved TFPL September 14, 2023, meeting minutes to Kevin Brown for posting.
- Submit Issue #55536 to Holloway to be placed on the agenda for the Joint Committee meeting.
- Issue #62716 will be returned to Subcommittee 2 and she will send a calendar invite within the next two weeks for an Ad Hoc meeting for both subcommittees to discuss the issue
- Issue #66274, forward to Holloway for the Joint Committee review
- Issues #61907 and #64760 forward to QR, SA and AA

Roundtable

Members were asked for any roundtable items:

- Williams thanked Kurita and Madison for keeping the meeting flowing by using Roberts Rules of Order.

- Rodriguez asked Balsara Mejbeen how the TFPL members can be kept informed of improvements being worked on by the IRS. Mejbeen advised the committee to submit all questions to their Analyst who will forward them to her.
- Jimerson responded to another question by Rodriguez that the Committee Chairs are responsible reporting on the work of the committees.
- Madison shared that several referrals were rushed this year. There appeared to be an extreme emphasis on getting referrals through the process. She noted that we should focus on quality, not the quantity of referrals. She concluded by encouraging the team to close 2023 by approving the elevation of referrals proudly using a consensus approach.
- Madison welcomed and thanked Mejbeen for her assistance and for providing guidance to the team.
- Earwood added that many things are happening with the systems changing and IRS positions being added. He noted that even if a referral recommendation is not accepted, it may still have an impact in providing ideas and sharing of information. He encouraged members to continue their good work.
- Kurita thanked members for their comments and engagement in the committee process.

Jimerson thanked members for attending the call. She stated that the robust discussion today was an example of how to get to consensus. It is all about making things better for the taxpayers by putting forward recommendations that will make a difference and improve customer service. She added that the analyst, Matherne, is the first line of contact for members with questions or in need of a SME. She concluded by stating that staff will do its best to research the issues and invite a SME to come and discuss the items.

Close

Meeting was officially closed at 2:59 PM, ET

**Next Meeting: Thursday, November 9, 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.