

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 11, 2024**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-------------------|--------------------|----------------|
| • Anthony Earwood | San Antonio, TX | Member |
| • Charles Harvey | Albany, NY | Member |
| • Kathryn Kempf | Greenville, WI | Member |
| • Debra Kurita | Fullerton, CA | National Chair |
| • Alisha Payton | Westland, MI | Member |
| • Charles Slaney | Wilsonville, OR | Member |
| • Alan Smith | Saint Louis, MO | Member |
| • Jantel VanOrden | Salt Lake City, UT | Member |
| • George Williams | Ridgeland, MS | Member |

Members Absent

- Elaine Adkins Conyers, GA Member

Staff

- | | |
|-------------------------|-------------------------------------|
| • Shawn Collins | Acting TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Jose Cintron Santiago | TAP Program Analyst |
| • Conchata Holloway | TAP Lead Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Christopher Duling | W&I |
| • Lisa Hunter | W&I |
| • Cindy Jones | W&I Chief Program Management Office |

Quorum

A quorum was met.

Welcome and DFO Report

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

- April 16, 2024, the Internal Communications Committee will have their first meeting beginning at 4:00PM ET. The ICC work on items for the Newsletter, the posting for the Facebook page. Members were

encouraged to join the Facebook page to follow and obtain information. ICC work on various projects assigned, the Speak Up Brochures, various items with www.ImproveIRS.org and www.TAPSpace.org sites.

Throughout the year there will be interesting project for the ICC to work

- April 18, 2024, the Outreach Committee will have their first monthly meeting beginning at 2:00PM ET. This meeting is led by the National Vice Chair. The Vice Chairs from each project committee will be in attendance.
- April 22, 2024, the Joint Committee will have their meeting beginning at 3:00PM ET. The Joint Committee is the overriding governing body for TAP where all committee Chairs and Vice Chairs meet to review the referrals submitted for elevation to the IRS. It is an open meeting and members were encouraged to attend. Members who may be interested in attending were encouraged to contact the Analyst who will forward the invite to join the call
- TFPL will meet on May 8, 2024, at the Face-to-Face (FTF) for the all-day training session. The Full Committee meeting will be all day on Thursday, May 9, 2024, and a half day on Friday, May 10, 2024. Members are expected to participate in all of the sessions.

National Office Update

Shawn Collins welcomed and thanked everyone for being on the call. The following National Office updates were shared:

- Members were encouraged to file their 2023 tax returns. Currently there are five days remaining for the filing season. Members were encouraged to file timely and to keep in mind if an extension is requested it is an extension of time to file but not an extension of time to pay
- Members were encouraged to subscribe to the NTA Blog for information regarding Living Abroad. The Blog can be found on LinkedIn, or your Analyst can share it with you.
- TAP Recruitment period ended on March 29, 2024. A total of one hundred-forty-three (143) applicants were received. Information is being processed to begin the interview process.
- TAC offices will begin opening on Saturdays. Members were encouraged to check their locations for Problem Solving days by checking the website or your Analyst who will be able to provide this information. This will be a good opportunity to conduct Outreach
- The Face-to-Face meetings have been scheduled and planned. The locations are Jacksonville, FL; Oklahoma City, OK; and San Antonio, TX
- Members will be contacted by Kevin Brown or Annie Gold who will assist you with travel arrangements. Your Analyst will also be available to answer any questions you may have regarding the upcoming travel.
- Members were encouraged to reach out to Collins with questions and or concerns.

Chair Report

Jantel VanOrden shared the following Chair Report:

- VanOrden attended both subcommittee meetings and is excited on the motivation and passion in making good changes this year
- Focus will continue to be on the TAP 2023 Annual Report to Congress, specifically the Most Serious Problem (MSP) Number 4 -- telephone and in-person service
- Focus will also be on reasonable and attainable goals
- Members were encouraged to read the TAP 2023 Annual Report and focus on MSP Number 4. VanOrden read through it and saw some changes she for discussion

Minutes Approval

TFPL March 12, 2024, Minutes approved as submitted.
VanOrden motioned and Earwood seconded.

Public Comments

None

Subcommittee Update

Subcommittee 1

Kathryn Kempf shared the following updates:

- Subcommittee 1 had their meeting on Thursday, April 4, 2024
- Reviewed the 1040 telephone flow chart.
- Reviewed the Taxpayers Bill of Rights (TBOR).
- Issue #62577, Customer Service Surveys was discussed. It was determined the surveys were too generic. Additional information was requested to determine if Subcommittee 1 will continue to work on this issue
- Subcommittee 1 will have their next meeting on Thursday, May 9, 2024

Subcommittee 2

Alisha Payton shared the following updates:

- Subcommittee 2 had their meeting Thursday, April 4, 2024.
- Reviewed the 1040 telephone flow chart.
- Determine if Issue # 60190, Social Media should be turned into a referral.
- Discussed the timeline for the upcoming Voice Box and Chat Bot projects.

Response Update

Rosalind Matherne shared the following updates on the responses for the referrals that were submitted in 2023:

- Issue # 69432, Online Chat Feature the response is expected to be received by July 05, 2024
- Issue # 66274, On hold Music and Messages response is expected by April 20, 2024
- Issue #61907, Dashboard Data for Where's my Refund response is due by April 30, 2024

- When the responses are received Matherne will share with the Full Committee

Outreach

Anthony Earwood provided the following Outreach update:

- Members were encouraged to read the 2023 Annual Report for excellent information shared in the report
- The updated Speak Up Brochures now has a QR code and is available.
- The Annual Report referenced 31 referrals, 531 recommendations of which, 47 percent were closed last year
- Members were encouraged to reach out to their local groups, churches and rotary clubs.
- Members were encouraged to reach out to their LTA for opportunities to conduct Outreach. The IRS Tax Forums will be coming up this year

Action Items

Matherne will do the following:

- Forward TFPL approved March 12, 2024, Minutes to Kevin Brown for posting on www.Improveirs.org and www.TAPSpace.org
- Follow-up with Issue responses for Issues #69432, #66274 and #61907. Responses will be forwarded to members when received.

Roundtable

VanOrden asked for comments and or questions

- Payton asked for clarification regarding the MSP Number 4 in the 2023 Annual Report information. VanOrden explained there is a specific area in the report under MSP Number 4 which discusses the IRS telephone line and contains issues the committee is working on. The details in this section has a lot of information that is good.
- Jose Cintron Santiago shared the link in TEAMS Chat for the Report to Congress
- Christopher Duling asked for a copy of the agenda
- Gold will be sharing travel information with members traveling to the FTF soon.
- Jimerson reminded members the Newsletter article is due to the Analyst by the 25th of each month and is published by the 5th of each month. Members were asked if there was a volunteer. VanOrden volunteered to do the article for April.
- Cindy Jones shared appreciation for being able to be on the call for the first time. She thanked Collins for her public announcement on being timely in filing and paying taxes. Jones is the Chief of the Program Management Office for Wage and Investments (W&I) which has changed its name to Taxpayer Services. Thank you to TFPL committee members for volunteering to assist in making recommendations to the IRS.

- Matherne confirmed the subcommittee meeting will be incorporated into the FTF meeting

Jimerson thanked everyone for being on the call. If there are any questions, comments, thought or anything that may have been unclear members were encouraged to reach out and not suffer in silence.

Close

Meeting was officially closed at 4:38PM ET.

Next Meeting: FTF Meeting in San Antonio, TX May 8, 2024

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