

**Toll-Free Phone Lines (TFPL) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, May 9, 2024**

**Designated Federal Officer**

- Shawn Collins TAP Director

**Attendance**

Debra Kurita	Fullerton, CA	N. Chair/Member
Jantel VanOrden	Salt Lake City, UT	Chair/Member
Charles Harvey	Albany, NY	Member
Kathryn Kempf	Greenville, WI	Member
Alisha Payton	Westland, MI	Member
George Williams	Ridgeland, MS	Member

**Members absent**

Fritz-Gerald Delice	Dacula, GA	Member
Anthony Earwood	San Antonio, TX	V. Chair/Member
Charles Slaney	Wilsonville, OR	Member
Alan Smith	St Louis, MO	Member

**Staff**

- Shawn Collins TAP Director
- Rosalind Matherne TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Robert Rosalia TAP Program Analyst

**Roll Call**

Rosalind Matherne did the roll call. There were no members to join via TEAMS and no members of the public in attendance.

**Quorum**

A quorum was met.

**Welcome and National Office Report**

Director, Shawn Collins thanked the committee for all of their work and taking the time out of their schedule to attend face-to-face. Collins also thanked those who volunteered for the tax forum, more information will be provided at a later time. Collins encouraged members to contact Annie or Kevin if they have travel questions to be sure to submit expenses for reimbursement as well.

**Chair Report**

Jantel VanOrden welcomed all members to the meeting and reviewed the agenda. The committee agreed to table the screening report and the meeting minutes to be approved at the next meeting. Matherne will send an invite to the screening committee to solicit a new date for a screening meeting.

### **Minutes Approval**

TFPL April 11, 2024, Minutes will be submitted at next month's meeting.

### **Public Comment**

No comments

### **Subcommittee Report**

Matherne provided the following update:

TFPL received and accepted **Issue 61907** and accepted **Issue 69432** and will be rebutting Recommendation ID 2743 for **Issue 69432**

- **Issue 61907** *Dashboard Data for Where's My Refund?*
  - o 6 recommendations 6 under consideration
- **Issue 69432** *On-line live chat feature*
  - o 7 recommendations 6 under consideration 1 non-adopt
- **Project 66274** *On Hold Music and Messages*, estimated completion date is July 5, 2024.

### **Subcommittee 1**

Kempf reported the subcommittee is considering working on Issue 62577 Surveys and rebutting recommendation ID. #2743 from Referral Number 69432

### **Subcommittee 2**

Payton reported the subcommittee is considering working on Issue 67028 Surveys and Issue 60190 Social Media

### **Outreach**

VanOrden provided the following updates for the Outreach Committee:

- It is possible the Outreach committee will be postponed due to face-to-face.
- Not a lot of traffic on the TAP Facebook (FB) page. VanOrden encouraged members to join FB and possibly consider being a FB Administrator
- VanOrden encouraged members to log their activity hours. Matherne confirmed member hours should be from the time they left home until they return.
- Use the Speak Up brochure to talk about TAP and recruitment.
- If you have problems logging in or general concerns regarding TAPSpace, contact Matherne.

### **Internal Communications Committee (ICC)**

Payton provided the following updates for the ICC:

- Like Outreach, it is possible the ICC meeting will be rescheduled due to face-to-face. More information will be provided.
- TFPL newsletter article is due the 25<sup>th</sup> of each month.
- We are looking for members for all committees that would like to be administrators of our social media platform.

### **Action Items**

Matherne shared the following Action item:

- Schedule upcoming screening meeting with members.
- Provide screening report with title and description to members.

### **Roundtable**

VanOrden thanked Matherne and the TAP staff for all of their efforts in providing a productive face-to-face meeting. Members agreed and expressed their appreciation for a great location, great customer service at the hotel and the work the staff put forward to bring a successful meeting.

### **Close**

Collins thanked everyone for their time and attention and being there at the annual TAP face-to-face. Collins also encouraged the members to input their hours in TAPSpace and submit their travel expenses to Annie or Kevin. Meeting was officially closed.

**The Next TFPL Full Committee Meeting: June 13, 2024, at 4 pm ET**

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