



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, June 13, 2024**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- Anthony Earwood San Antonio, TX Member
- Charles Harvey Albany, NY Member
- Debra Kurita Fullerton, CA National Chair
- Alisha Payton Rochester Hills, MI Member
- Alan Smith Saint Louis, MO Member
- Jantel VanOrden Salt Lake City, UT Member

Members Absent

- Elaine Adkins Conyers, GA Member
- Kathryn Kempf Greenville, WI Member
- Charles Slaney Wilsonville, OR Member
- George Williams Ridgeland, MS Member

Staff

- Shawn Collins Acting TAP Director
- 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 Attorney

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:

- Interviews have been completed for the Recruitment period. There have been a lot of good candidates who are engaging.
- June 20, 2024. Outreach will have their monthly meeting beginning at 2:00PM, EST and will be led by the TAP National Vice Chair, Michelle Brookens

- June 20, 2024, the Internal Communication Committee will have their monthly meeting beginning at 3:00PM, EST.
- June 27, 2024, the Joint Committee will have their monthly meeting beginning at 3:00PM, EST. Members were encouraged to join in to hear what goes on with the TAP project committees.

National Office Update

Shawn Collins welcomed everyone for being on the call. Appreciation was expressed to members for taking time out of their schedules to volunteer and be a part of TAP. The following National Office updates were shared:

- Members were encouraged to enter all time spent doing TAP work onto their Activity Reports to gain credit for all time.
- The Tax Forums begins on July 08, 2024, with the first one being held in Chicago, IL. Members and Staff members will be attending.
- Members who have not received their travel reimbursements were advised to reach out to Annie Gold or Kevin Brown for assistance.
- The Joint Committee's Planning Face-to-Face session is in the final process. All of TAP project committee Chairs will be attending. August 26, 2024, through August 29, 2024. August 27, 2024, and August 28, 2024, are meeting days. August 26, 2024, and August 29, 2024, will be travel days. This meeting will be held in Jacksonville, FL
- Members who have not received their business cards were advised to reach out to their Analyst, The Analysts will follow up and make sure to get the business cards out.
- July 10, 2024, Quarterly TAP Virtual Meeting will be held. The calendar invite will be sent to each member to participate. The agenda has been put together for 1.5 hours.
- Christopher Duling will be attending the Chicago Tax Forum and will be presenting information on Refund and Assessment Statue

Chair Report

Jantel VanOrden shared the following Chair Report:

- Subcommittee 1 is working on referral #62577 and the rebuttal of recommendation 2743 from referral #69432
- Subcommittee 2 is working on referral #67428 and referral #60190 adding recommendations to be forwarded to Kelvin. Alisha Payton will be assisting on updating.
- Members were challenged to call the toll-free telephone line and asked if their Tax account were compliant. Debra Kurita called and had a good experience, Kathryn Kempf was on the call for two hours and hung up and Anthony Earwood call and was on the phone for thirty-three minutes and the phone disconnected. Once member get onto the call and stay on, they are fine.

Minutes Approval

TFPL April 11, 2024, and May 13, 2024, Minutes approved as submitted. Kurita motioned and Earwood seconded.

May 09, 2024, Minutes were approved with corrections. Kurita motioned and Earwood seconded.

Public Comments

None

Subcommittee Update

Subcommittee 1

Charles Harvey shared the following updates:

- Subcommittee 1 had their meeting on Thursday, June 06, 2024
- Issue #69432, the recommendation 2473. The response came back as not adopted. Subcommittee 1 need the Full Committee to make decision on the rebuttal.
- TCC is working on an issue that deals with the Chat Bot
- Issue #62577 came back as no issue identified. One recommendation will be worked by Anthony Earwood and Debra Kurita

Subcommittee 2

Alisha Payton shared the following updates:

- Issue #61907, Dashboard data for Where's my Refund, was started on last year in June 2023. Recommendation was received back from IRS and reviewed during their last meeting.
- Issue # 60190, Navigating through Toll Lines effectively and efficiently. VanOrden is working to do the wording. Payton will work to finish the proposal. Kelvin Johnson supplying an example to follow. George Williams will assist in getting questions to ask the SME.
- Issue #67028, Subcommittee 2 is reworking the wording to be more definitive.

Response Update

Kelvin Johnson stated he received a response on today. He will review and shared with the committee.

Outreach

Earwood provided the following Outreach update:

- The Outreach Report for May was less than ten percent on hours and Full Committee meetings was eighteen hundred hours.

- Members encouraged to not forget about the Activity Reports. Make sure to count all conversations.
- Congratulations to TFPL for being in the top two committee with hours.
- Members were advised to look at IRS e-news services subscriptions. When talking to people make sure to tell them about TAP, places to go or about tools that are available. Direct File has been increased and will be permanent across the nation. Free File has a five-year contract extension. There are a lot of ways for Taxpayers to submit their Taxes. This can also provide other Outreach opportunities.
- Business cards now have a QR Code on the back. This is an excellent tool to be used.
- Members were encouraged to reach out to their LTAs for Outreach opportunities and get out in their neighborhoods and make contact to continue moving forward to make Outreach work.
- VanOrden added there are a lot of areas to go and get information.

Internal Communications Update

Al Smith apologized for not being able to attend the meeting. Payton shared the following:

- Proposal #68481, Allowing the public to join the Email list for meetings. Members are working to combine ideas to write the proposal.
- Reminding member to be a part of the administrative group for the social media platform
- The Newsletter submissions are due by the twenty-fifth of the month.
- A calendar was started to see who would write the Newsletter article each month.

Action Items

Kelvin Johnson shared the following:

- Provide additional research for Issue #69432 and requested the SME on June 07, 2024
- Issue #61907 sent the request for clarification on SA response and provided members with the most serious problem number four as additional research.
- Issue #66274, response was received and review to share with member.
- Issue #67028 VanOrden will provide information by July 08, 2024
- Issue #60190 has not Taxpayer contact information to contact.
- Issue #61907 was sent to member for review and vote to accept IRS response. Members will inform Johnson of their decision.
- Forward TFPL approved April and May 2024, Minutes to Kevin Brown for posting on www.Improveirs.org and www.TAPSpace.org

Roundtable

VanOrden asked for comments and or questions.

- Kurita requested that when members or staff are identifying a referral to note both the number and the title of the referral. As the National TAP Chair, members advised to continue completing the Activity Reports, do Outreach and include on the Activity Report, include the face-to-face meetings when talking to neighbors or friends and share the information on TAP. Appreciation expressed on the URL code on the back of the business cards.
- Payton requested clarification for July committee and subcommittee meetings.
Full Committee meeting remains unchanged on July 11, 2024
Subcommittee 1 July 01, 2024
Subcommittee 2 July 03, 2024
Screening Committee July 24, 2024

Jimerson thanked everyone for being on the call. Appreciation was expressed for a very productive meeting.

Close

Meeting was officially closed at 4:50PM, EDT.

**Next Meeting: Thursday, July 11, 2024
2:00PM EDT, 3:00PM CDT, 09:00AM MDT, 08:00AM PDT**

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