

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

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-----------------------|--------------------|----------------|
| • Jantel VanOrden | Salt Lake City, UT | Chair |
| • Anthony Earwood | San Antonio, TX | Vice Chair |
| • Delice Fritz-Gerald | Dacula, GA | Member |
| • Charles Harvey | Albany, NY | Member |
| • Debra Kurita | Fullerton, CA | National Chair |
| • Alisha Payton | Westland, MI | Member |

Members Absent

- | | | |
|-------------------|-----------------|--------|
| • Elaine Adkins | Conyers, GA | Member |
| • Charles Slaney | Wilsonville, OR | Member |
| • Alan Smith | Saint Louis, MO | 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 |

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:

- The National Taxpayer Advocate, Erin Collins released two reports. The first one is the Annual Report to Congress and the second one is the Midyear Objective Report. It outlines the objectives for the year. It was delivered on June 26, 2024, it highlights delays in resolving ID Theft cases, and impact to burden to Taxpayers. Another area of interest is where the National Taxpayer Advocate, Erin Collins talks about how IRS

measure its level of service regarding the Toll-Free phone lines. Members were encouraged to look over the report

- The National Tax Forums have begun. Currently a forum is being held in Chicago and is scheduled to run July 09, 2024, through July 11, 2024. Members will be attending the other forums that will be held in Orlando, Baltimore, Dallas, and San Diego There will be TAP Staff and members attending the forums.
- There are four full Committee meetings remaining for this year. There is lots of work to be done in getting referrals completed and forwarded to the Joint Committee for approval prior to forwarding to IRS. Appreciation was express to members for the work being done
- On July 10, 2024, TAP Annual Quarterly Meeting was held. There were speakers from Direct File available to speak with members and provided good information. Members were encouraged to reach out to Kelvin Johnson or Jimerson with thoughts or ideas
- The Outreach Committee will have their meeting on July 18, 2024, beginning at 2:00PM, EST and is led by TAP National Vice Chair, Michelle Brookens and attended by the Vice Chairs
- On July 18, 2024, ICC will have their monthly meeting beginning at 2:00PM, EST. Discussion on the internal and external communications and messaging for TAP
- The Joint Committee will have their monthly meeting on July 25, 2024, beginning at 3:00PM, EST. This is a meeting with the TAP Chairs to review the referrals that have been submitted for approval and forward to the IRS. They also discuss other topics relative to TAP. The meeting will be open and members were encouraged to sit in on the meeting

Chair Report

Jantel VanOrden shared the following Chair Report:

- The committee is working Issues 62577, Customer Service Survey; Issue 66274, On Hold Messages; Issue 69432, Online Chat Features; Issue 60190, social media; Issue 61907, Dashboard Data Where is My Refund, and Issue 67028, The Right to Quality Service
- VanOrden is working on ideas for the social media, the Dashboard Date Where is My Refund, and the Right to Quality Service
- Johnson submitted a request to have a SME on June 07, 2024, for Issue 69432 the Online Chat Features. Johnson added the SME will be attending the committee's August 08, 2024, meeting. Members were sent an email asking for questions to present to the SME by July 15, 2024. Forward all questions to Johnson
- Johnson informed the committee he is still waiting for the response on Issue 61907 from SA
- Issue 66274 will be reviewed during today's call

- A brief status on Issue 67028 VanOrden working hard still
- Issue 60190 VanOrden has done work and will speak with Alisha Payton after the meeting for discussion
- Issue 61907 was sent for review to accept IRS response will be reviewed during Subcommittee 1 report

Minutes Approval

TFPL June 13, 2024, Minutes were approved with corrections.
George Williams motioned, and Debra Kurita seconded

Public Comments

None

Subcommittee Update

Subcommittee 1

Charles Harvey shared the following updates:

- Issue 62577, Customer Service Survey, Anthony Earwood submitted the draft to members for review. Subcommittee 1 is ready to move forward
- Issue 66274, On Hold Messages, Subcommittee 1 is requesting information on ID 2889 to submit a rebuttal. The draft to be work by Subcommittee 1 members
- Issue 69432, Subcommittee 1 members are waiting for the SME. They received the email for question to present to the SME. Members were encouraged to share their questions
- Earwood added the project statement was changed for Issue 62577. He wanted to make sure the committee was ok with it

Subcommittee 2

Alisha Payton shared the following updates:

- Subcommittee 2 had their meeting
- Discussion was held on Issue 60190, social media. They went over drafting of the referral during their next meeting
- Issue #61907, Dashboard data for Where's my Refund, is ready for the full committee to review today
- Issue #67028, Rights and Quality of Service Survey update was provided by VanOrden
- VanOrden will schedule a meeting with Subcommittee 2
- Payton will work on the submission of the article for the Newsletter

Response Update

Kelvin Johnson shared the following update for IRS responses

- There were twenty-one recommendations and other recommendations
- 2875, 2876, 2877, 2878 were non-adopt
- 2879 already implemented
- 2880 non-adopt

- 2881 already implemented
- 2882 non-adopt
- 2883 already implemented
- 2884 and 32885 were non-adopt
- 2886 and 2887 already implemented
- 2888 non-adopt
- 2889 will do a rebuttal was a non-adopt
- 2890 already implemented
- 2891 non adopt
- 2892, 2893, 2894, and 2895 were already implemented
- VanOrden express clarification on what is meant when it says already adopted. Johnson stated in the process of the recommendation being thought of and submitted it had already implemented. Kurita added the dates were not shared

Outreach

Earwood provided the following Outreach update:

- Members were encouraged to share any Outreach activity being held with Earwood to be recorded and documented
- George Williams stated he completed an Outreach event with his LTA on June 29, 2024, and he has another one scheduled for the July 26, 2024. Johnson asked Williams to share a detailed summary of the activity event with him and Earwood to receive credit
- Earwood shared he participated in an Outreach event on last week with SCORE three days in Austin with the Southwest Regional meeting. There were sixty people there. The District Director of Small Business Administration was there. SCORE CEO was there seated next to Earwood. He asked if TAP could get a QR code. It will be a great Outreach for TAP. TAP was promoted there with a lot of opportunity
- The TAX Forum coming up in Orlando has been sold out. They are expecting up to three thousand people to attend. There will be forty-five seminars at the forums with a lot of information, resources, and feedback with issues from customers
- The June Report issued from Erin Collins provided a lot of wonderful information in it. There is of wealth of things for TAP to work on including what is working, what is not working, telephone service and other areas of IRS. Member were encouraged to look at the report and coordinate with the LTAs for collaborative issues to work
- Members were reminded to use their business cards, the toolkits, news articles, Outreach sources, any events going on to assist in doing Outreach
- There will be a lot of things going on with TAS Problem Solving Days. Members were encouraged to try and participate. There could be a lot of opportunities with issues for TAP to work

Internal Communications Update

Payton shared the following:

- Proposal #68481, ICC is trying to utilize the email subscription service so the public can sign up to receive updates. They are trying to find the best ways to proceed. They are working on the draft of the referral
- Matthew O'Sullivan added they were able in getting IRS to add the Speak Up Brochures with the QR code at the VITA Sites next season.

Action Items

Kelvin Johnson shared the following:

- Issue 62577 information was sent to members asking to be reviewed. It will be forwarded to the Joint Committee for their August meeting
- Email forward to members asking for question to be submitted to Johnson on Issue #69432 by July 15, 2024
- Fritz-Gerald was added to www.TAPSpace.org and his picture. Members advised to go to the public facing site to view pictures
- The roster was updated. TFPL has a new member, Johnson will verify and update the roster accordingly
- Forward TFPL approved June 13, 2024, Minutes to Kevin Brown for posting on www.Improveirs.org and www.TAPSpace.org

Roundtable

VanOrden asked for comments and or questions.

- Kurita reminded member to complete their Activity Reports
- Williams added he has been working with his LTA and has received good assistance

Shawn Collins expressed thank you to member for joining the TAP Quarterly Meeting with the speakers who did an outstanding job. The meeting was very informative. More meetings to share information will be held in the future.

Jimerson thanked everyone for being on the call.

Close

Meeting was officially closed at 4:49PM, EDT.

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

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