



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, August 08, 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 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:

- Interviews have been completed for the new members and alternates. The package is being worked to move to the next phase. Currently in the process of obtaining background checks to begin the recommendations for the next TAP year



- Attendance at the Tax Forum is in full swing for the season. The next meeting will be held in Baltimore, MD on August 13-25, 2024. TAP members will attend all the forums. The Dallas Tax Forum will be held on August 20-22, 2024. The last forum will be held in San Diego, CA on September 10-12, 2024
- Appreciation was expressed to members attending the forums. The members attending and will be receiving CPE credits were extended best wishes
- The Outreach Committee will have their meeting on August 15, 2024, beginning at 2:00PM, EDT and is led by TAP National Vice Chair, Michelle Brookens and attended by the Vice Chairs
- On August 16, 2024, ICC will have their monthly meeting beginning at 3:00PM, EDT. Meeting date moved TAP Staff unavailable attending training
- The Joint Committee will have their monthly meeting on August 22, 2024, beginning at 3:00PM, EDT. 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 to the public and members were encouraged to sit in on the meeting
- August 27-28, 2024, the Joint Committee Planning Session will have their face-to-face meetings. Members discuss concerns regarding the TAP program and look at issues for the 2025 TAP season
- Debra Kurita added the Joint Committee will have a joint meeting with the By Laws section looking at proposals for updating the By Laws

Chair Report

Jantel VanOrden shared the committee is working on the following:

- Issue 60577, Customer Service Survey to be voted on during the meeting. Anticipates taking to the Joint Committee
- Issue 66274, Oh Hold Messages
- Issue 69432, Online Chat Features the rebuttal part for the recommendation 2743
- Issue 67028, The Right to Quality Service
- Issue 60190, Social Media
- Issue 61907, Where is My Refund
- Kelvin Johnson sent an email message in reference to a volunteer opportunity
- VanOrden participated in a day volunteered in her community where she used the opportunity to do Outreach. A taxpayer shared frustration with the TFPL service. She noticed a disconnect between what IRS is communicating and the understanding of the CSR. VanOrden submitted a



recommendation with one of the issues being work to possibly help this issue if adopted

Minutes Approval

TFPL July 11, 2024, Minutes were approved as submitted. Debra Kurita motioned, and Anthony Earwood seconded

Public Comments

None

Subcommittee Update

Subcommittee 1

Charles Harvey shared the following updates:

- Issue 66274, On Hold Messages, Subcommittee 1 met with CSR coordinated by IRS. They received a lot of good information on how it is done and the ability to call the Taxpayer back. This is with the Issue 69432 and sub item 2743. A copy of the IRM document was provided for the subcommittee to review. Member are working to obtain additional information
- Issue 62577, Customer Service Survey, ready to have the full committee vote to move to the Joint Committee
Earwood motioned to forward to the Joint Committee and Kurita seconded.
Decision: Full Committee Consensus move to Joint Committee for approval

Subcommittee 2

Alisha Payton shared the following updates:

- Issue #60728, Rights and Quality of Service Survey, Subcommittee 2 removed survey. Surveys are being worked by Subcommittee 1. Members focused on the right to quality service. Suggested putting ideas out more than once with the wording different may get a yes. Members were asked for knowledge of any parts being done to share with the subcommittee. Discussion with the full committee, Subcommittee 2 will keep 1 and 4 of the recommendation and remove 3 and 4. They will continue to do Outreach for feedback
- Issue 60190, Social Media was reworded. Subcommittee requested feedback from the full committee. They went over drafting of the referral during their next meeting
- Issue 61907 Subcommittee 2 in discussion to proceed.

Screening Report

Earwood shared the following update for IRS responses

- A total of 109 issues were reviewed. Some were old and dealt with customer service: 97 were related, 12 research and transfer, 1 direct file, 60 remaining to go through by next month's meeting
Kurita moved to accept the Screening Report
Decision: Full Committee Consensus accept the Screening Report as submitted

Outreach

Earwood provided the following Outreach update:

- Earwood participated in the Orlando, FL Tax Forum. There were over a thousand participants who attended. A lot of practitioners participated, and Earwood was able to meet with them. Forty plus seminars were presented, IRS had a case resolution there solving taxpayers' issues, listening to taxpayers, and trying to answer their questions, and referring them to the seminars they needed to get to. There were good comments provided
- Information about TAP is getting out to the public
- The city of San Antonino will be watching a platform for all businesses to get together and share information. TAP will be a part of this to help with Outreach
- George Williams also has an Outreach scheduled with his LTA
- Kurita will be participating in an Outreach event with the LTA in California with the Senior Services organization
- Members were encouraged to continue doing Outreach and reach out if questions should arise

Internal Communications Update

Payton shared the following:

- ICC is still in need of volunteers to assist in doing the postings or be an administrator behind the scenes
- Members were asked for articles they may have to be included in the postings in the September Newsletter, contact Payton
- The deadline is August 25, 2024
- A schedule for the remainder of the year for submissions is needed
- VanOrden added she has three interviews scheduled with taxpayers and will write up for a backup plan

Action Items

Kelvin Johnson shared the following:

- Forward TFPL approved July 11, 2024, Minutes to Kevin Brown for posting on www.Improveirs.org and www.TAPSpace.org
- Forward Issue 62577 to the Joint Committee



- Update the system to show Subcommittee 1 and Subcommittee 2 work being done
- Subcommittee 2 update the correct issue number is 67028 for The Right to Quality Service
- VanOrden and Payton will edit Issue 60190
- Determine the date for the Subcommittee
- Updates will be placed on the system
- Responses are needed on the Voice Bot volunteer availability is needed by August 14, 2024. This is needed for the September 05, 2024, meeting with the SME

Roundtable

VanOrden asked for comments and or questions.
Emails are appreciated with comments

Jimerson thanked everyone for being on the call.

Close

Meeting was officially closed at 5:08PM, EDT.

**Next Meeting: Thursday, September 12, 2024
2:00PM EDT, 3:00PM CDT, 09:00AM MDT, 08:00AM PDT**

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