



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, September 12, 2024**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

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

Members Absent

- Charles Slaney Wilsonville, OR Member
- Alan Smith Saint Louis, MO 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
- Mejbeen Balsara Taxpayer Services

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:

- A solicitation letter was sent to members asking for volunteers for the Annual Report Team. First and second year members were encouraged to participate. Members would proofread the work making sure of the uniformity to the work done in TAP

- A solicitation for volunteers to participate in the Stakeholders Partnership Education and Communications (SPEC) Outreach event on September 26, 2024. This will be an initiative to prevent scams and to share the information while doing Outreach in the local communities for the elderly, language challenged
- Today the last day for the Tax Forums. The last one held in San Diego, CA closes out today. Philip Hwang and Debra Kurita attended and participated in this forum
- The Outreach Committee will have their meeting on September 19, 2024, beginning at 2:00PM, EDT
- On September 19, 2024, ICC will have their monthly meeting beginning at 3:00PM, EDT
- The Joint Committee will have their monthly meeting on September 26, 2024, beginning at 3:00PM, EDT

Chair Report

Jantel VanOrden shared the committee is working on the following:

- This month has been very productive for VanOrden. She participated in Outreach events locally. A new LTA was assigned in her area. Still waiting on a response after reaching out to her
- Subcommittee 1 has finished two of their issues and is ready for the committee's vote.
- Subcommittee 2 has been working on their issues. They anticipate having two ready during next month's meeting

Minutes Approval

TFPL August 08, 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 presented a rebuttal for the Full Committee to vote on to move forward
Debra Kurita motioned to forward to the Joint Committee and VanOrden seconded.
Decision: Full Committee Consensus move to Joint Committee to send back to IRS
- Issue 69432, Subcommittee 2 met with the SME and discussed how IRS Customer Service Agents deals with Taxpayers who must call back.

Members revised the rebuttal and requesting the Full Committee's vote to move forward

VanOrden motioned and Charles Harvey seconded

Decision: Full Committee Consensus move forward to the Joint Committee to forward back to IRS

Subcommittee 2

Alisha Payton shared the following updates:

- Issue 60190, Subcommittee 2 received feedback and ready to wrap up this issue with the Full Committee vote to move forward
- Issue 67028, Right to Quality Service Survey. VanOrden will have this issue ready during Subcommittee 2 next meeting. She will forward to Kelvin Johnson to share with members for feedback
- Issue 61907 Subcommittee 2 requested Full Committee vote to accept IRS response

Kurita motioned to accept, and George Williams seconded

Decision: Full Committee Consensus accept IRS response and tasked Johnson to follow up on changes

- VanOrden mention the request for volunteers for the WMR/WMAR Voice Bot testing. Member received a presentation going through some of the items. VanOrden added she was able to share with members of the Subcommittee on the time commitment. Kurita agreed it did not take long using the spreadsheet that was provided. Johnson will receive members responses. Members will send copies of the information to members

Screening Report

Earwood shared the following update for IRS responses

- The Screening Committee met on August 21, 2024. It was the second part of the Screening Committee's meeting
- Most of the issues that came forth were closed. Several were sent to Special Projects Committee. One went to Notices and Correspondence Committee. One to the Parking Lot. Feedback requested from members

Kurita motioned to accept the Screening Report and VanOrden seconded.

Decision: Full Committee Consensus accept the Screening Report as submitted

- Members were encouraged to reach out with comments or feedback

Outreach

Earwood provided the following Outreach update:

- Several members have been involved with the Tax Forums. Expressions of appreciation was expressed
- Members were able to gather ideas for referrals. Anticipating using during next year

- Harvey has been working with the Senior Centers
- In San Antonio Earwood is working with SCORE and looking forward to participating with them. There are a lot of good things in store Outreach
- Members were encouraged to add the information to the Activity Reports
- Members were reminded to reach out for assistance. Earwood will add the information onto the report
- Great job with the LTAs
- It is very important to get credit for the activity being done
- Delice FitzGerald added he participated with six to seven hundred people. He was very happy to be a part of the event and shared one hundred fifty SpeakUp Brochures.

Internal Communications Update

Payton shared the following:

- The Newsletter article is due on September 25, 2024. Charles Harvey will submit the article for September
- ICC will have their monthly meeting on next week September 19, 2024
- Issue 68481, Allow Members of the Public to join an Email List for TAP Members will be discussed on next week for wrap up
- O'Sullivan added information was inadvertently sent to TAC that was intended for ICC on Project 67035, Need Process for Screening Issues on www.ImproveIRS.org. Also needing to provide reporting on the status. The other was to show the top ten training suggestions of what has been submitted. Lastly to share big wins of TAP to demonstrate work being done. This will be discussed during next week's meeting
- ICC is trying to schedule a meeting to rotate members or switch out with new members to be administrators for the Facebook site. Members were encouraged to reach out if interested in being a part
- The August Newsletter has been released

Action Items

Kelvin Johnson shared the following:

- Forward TFPL approved August 08, 2024, Minutes to Kevin Brown for posting on www.Improveirs.org and www.TAPSpace.org
- Subcommittee 1 voted to send the rebuttal back to IRS on Issue 66274, On Hold Messages and Issue 69432, Online Chat Features
- Issue 61907 was voted on to accept IRS recommendations. Issue will be closed
- Update the Screening Report to show the closed issues and status of issues
- Information on the Chat Bot was shared with members. Any members interested in participating were encouraged to reach out to Johnson and he will share the information



Roundtable

VanOrden asked for comments and or questions.

Earwood expressed the meeting was amazing

Kurita added the Tax Forum in San Diego, CA had twenty-two hundred registered participants. They shared a table with the LITC representatives. TAP's tablecloth was on one end and LITC on the other. TAP's awareness is getting out. The National Taxpayer Advocate, Erin Collins visited on Tuesday. Pictures were sent to Angela Madison who posted them. IRS was everywhere. Kurita was able to speak with the Taxpayer Experience Office. Opportunities are out there for TAP to work with them. Recognition was shown to Kurita and Hwang being there for TAP

Jimerson thanked everyone for being on the call.

Close

Meeting was officially closed at 4:58PM, EST.

**Next Meeting: Thursday, October 10, 2024
4:00PM EST, 3:00PM CST, 02:00PM MST, 01:00PM PST**

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