

**Toll-Free Phone Lines (TFPL) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, November 14, 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       | Rochester Hills, MI | Member         |
| • George Williams     | Ridgeland, MS       | Member         |

**Members Absent**

- |                  |                 |        |
|------------------|-----------------|--------|
| • Charles Slaney | Wilsonville, OR | Member |
|------------------|-----------------|--------|

**Staff**

- |                      |                              |
|----------------------|------------------------------|
| • Shawn Collins      | TAP Director                 |
| • Kelvin Johnson     | TAP Program Analyst          |
| • Matthew O'Sullivan | TAP Program Analyst          |
| • Rosalind Matherne  | TAP 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:

- Today is the last day to vote for the TAP National Chair and Vice-Chair. Members can place their vote up to mid-night tonight.
- November 15, 2024, the end of the year Graduation Ceremony will be held beginning at 1:00PM, EST to celebrate Debra Kurita, Charles Harvey, and George Williams third-year retirement from TAP. Congratulations graduates.

- Retiring members were encouraged to get their Activity Reports completed with their hours. This will determine the level of President's Volunteer Service Award they will be receiving.
- Returning members were encouraged to submit their time on the Activity Reports.
- November 14, 2024, ICC had their final meeting prior to the start of this meeting.
- November 21, 2024, The Outreach Committee will have their meeting beginning at 2:00PM, EST.
- November 21, 2024, The Joint Committee will have their last meeting beginning at 3:00PM, EST.

### **Chair Report**

Jantel VanOrden shared the following Chair updates:

- The Annual Chair Report for TFPL has been finished and sent for approval. Thank to Anthony Earwood, Kelvin Johnson for assisting.
- VanOrden will be participating in an Outreach event with the IRS Liaison from Utah.
- To the graduating members you will be missed.
- VanOrden is excited and looking forward to the new year.

### **Minutes Approval**

TFPL October 10, 2024, Minutes were approved as submitted.

Anthony Earwood motioned, and Debra Kurita seconded.

### **Public Comments**

None

### **Subcommittee Update**

Subcommittee 1

Harvey stated Subcommittee 1 and Subcommittee 2 will be combine for their report. Charles Harvey shared the following updates:

- Issue 62577, Standardized Customer Service Survey has two items recommendation; 3388 was non-adopt by IRS and 3389 IRS responded it is under consideration and will be implemented in October. Subcommittee 1 recommended IRS responses be accepted by the full committee.

**Kurita motioned to accept and revisit item 3388 in the future, and Earwood seconded.**

**Decision: Full Committee Consensus accept Subcommittee 1 recommendation on Issue 62577.**

The Staff will monitor for status update.

- Issue 74653, Testing the Voicebot is set for TAP year 2025 to work.

- Issue 76133, Where is My Amended Return is now ready to forward to IRS for consideration. It will be forwarded to the Joint Committee with five recommendations if approved.

**Kurita motioned to approve, and Earwood seconded.**

**Decision: Full Committee Consensus approve Issue 76133 to go to the Joint Committee for approval.**

### **Outreach Report**

Earwood shared the following Outreach Report:

- Thank you to VanOrden who will be doing Outreach with the LTA in the west this month.
- Encouragement expressed to members it would be a good idea to establish partnerships going forward in 2025 on Outreach events scheduled, workshops partnering with various economic development companies and how IRS and TAP can assist.
- Graduates were encouraged to share information they have to assist the members coming aboard concerning the LTA information scheduled for the future or could be scheduled is important going forward.
- Members were encouraged to get their Outreach hours in and onto the Activity Report as the end of the year is approaching.
- Members were encouraged to look at SPEC for possible Outreach opportunities and begin planning for the next year events.
- Appreciation was expressed to members for the work they have done. The Outreach Committee has good numbers and should increase over the next reporting period.
- Members were encouraged to continue plan for 2025 and get in touch with their LTAs for future work.

### **Internal Communications Update**

Alisha Payton shared the following:

- ICC is continuing to work on Issue 68481, Allow Members of the Public to join an Email List for TAP Meetings. They are still in the process of gathering additional information and finalizing.
- Matthew O'Sullivan confirmed the ICC meeting was rescheduled for today. Both issues on the Email list and the screening procedures will be pushed forward for TAP year 2025.
- The Newsletter article for December is due on November 25, 2024. VanOrden will do the submission for December.

### **Action Items**

Kelvin Johnson shared the following:

- Forward TFPL approved October 10, 2024, Minutes to Kevin Brown for posting on [www.Improveirs.org](http://www.Improveirs.org) and [www.TAPSpace.org](http://www.TAPSpace.org).
- Update the system with the approval for Issue 74653.
- Update to show continued work to be done on the Streamlining the Customer Service issue.
- Issue 76133, Where's My Refund response was provided to members and update approval to send to the Joint Committee.

### **Roundtable**

VanOrden asked for comments and or questions.

- George Williams shared information on his interaction with the LTA and looking forward to the incoming member for Mississippi. He will continue working on a lot of things along with bringing on a few other volunteer Tax personnel.
- Kurita expressed she is looking forward to the celebration of service on tomorrow. Appreciation was expressed to the committee for the work they have done with good referrals going forward. She shared a reminder to submit hours of work on the Activity Reports. Remember to vote and appreciations for all the work members do.
- Thank you for all you do for TAP.
- Fritz-Gerald Delice expressed thank you to Kurita, Johnson, and Brown for assisting him.
- Matherne expressed to members gratitude. Thank you to all and to Johnson. She is looking forward to working with everyone.
- Payton expressed appreciation.
- Earwood thanked everyone and encouraged the third-year members to reapply.
- VanOrden closed the discussion with thank you to Johnson and members.

Shawn Collins shared acknowledgement and appreciation to Kelvin Johnson for doing an outstanding job as the Analyst while Rosalind Matherne was on Detail.

- Thank you expressed to Johnson for stepping up and taking on the responsibility.
- To Matherne, thank you for your return and you were missed.
- To TFPL volunteers, you are appreciated for taking time from your lives, doing the work and being passionate about it.
- The link has been placed in the Chat to place your votes that will post tonight.
- Collins is looking forward to seeing everyone at the graduation ceremony.
- Thank you too all.



Jimerson expressed appreciation to Kurita, Harvey, and Williams on their retiring from TAP. It has been a pleasure working with each of you.

- They were encouraged to share suggestions and continue to share the word about TAP.
- To all first and second-year members, encouragement to complete their preference for what committee they would like to be assigned for next year.
- Members were encouraged to continue to do Outreach. There will be no additional meetings for this year. Look for communications on when the meeting will resume next year and your committee assignments.
- TAP Staff will continue to work through December. Members were encouraged to send emails messages or call the Staff if needed.

**Close**

Meeting was officially closed at 4:44PM, EST.

**Looking forward to seeing everyone at the graduation ceremony.**

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