



**Toll-Free Phone Lines (TFPL) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, March 11, 2025**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |                    |                    |            |
|--------------------|--------------------|------------|
| • Anthony Earwood  | San Antonio, TX    | Chair      |
| • Charles Slaney   | Wilsonville, OR    | Vice Chair |
| • Vahagn Aganikian | Las Vegas, NV      | Member     |
| • Caroline Kim     | Honolulu, HI       | Member     |
| • Kandace Shawn    | Perris, CA         | Member     |
| • Mark Sullivan    | Beverly, MA        | Member     |
| • Jantel VanOrden  | Salt Lake City, UT | Member     |
| • Thomas Wolf      | Canton, OH         | Member     |

**Members Absent**

- |                 |               |        |
|-----------------|---------------|--------|
| • Luis Marrero  | Lafayette, LA | Member |
| • Alisha Payton | Westland, MI  | Member |

**Staff**

- |                         |   |
|-------------------------|---|
| • Shawn Collins         | TAP Director                                |
| • Rosalind Matherne     | TAP Program Analyst                         |
| • Kelvin Johnson        | TAP Program Analyst                         |
| • Jose Cintron Santiago | TAP Program Analyst                         |
| • Annie Gold            | TAP Administrative Assistant                |
| • Cindy Jones           | Chief, Taxpayer Services Operations Support |
| • Mejbeen Balsara       | Taxpayer Services Operations Support        |

**Quorum**

Quorum was not needed for today's administrative meeting.

**Welcome and DFO Report**

Susan Jimerson opened the meeting and welcomed members to the call. A brief overview of the TAP process and the agenda was shared.

**Chair Report**

Anthony Earwood welcomed everyone to the call. He shared his appreciation, and he is looking forward to a good year. He provided the following updates:

- TFPL will be working on projects, getting questions answered
- Members will be looking into the different sites for answers
- Members and committees will share information to help with project work
- The business cards and other tools to assist in Outreach will be mailed to each member

### **Minutes Review**

TFPL Minutes were reviewed for accuracy or grammatical errors. Members were encouraged to review the minutes and if there are any questions reach out to Earwood or Rosalind Matherne. The approval will be done during the next full committee meeting.

### **Public Comments**

None

### **Annual Report Update**

Jimerson shared the following updates:

- The Annual Report has been completed and is now with the graphic design area
- Issuance of copies is getting close
- Members were thanked for their patience. There have been some challenges with all the changes throughout the country
- A balancing act is being done between producing the Annual Report and the Low-Income Taxpayer Clinic. The Communication Liaison person is very busy working on the two reports
- IRS anticipates a soft launch in early March

### **Subcommittee Reports**

Subcommittee 1

Charles Slaney shared the following updates for Subcommittee 1:

- Had their meeting on March 04 and 05, 2025
- Members attended were Anthony Earwood, Thomas Wolf, and Slaney
- Discussions review of writing referrals and flow charts were held
- Slaney requested copies of the Annual Report be shared with members for future referrals
- Issue 78148, Chatbot and Live Chat Tech were discussed
- Issue 74653, Streamlining was discussed
- Issue 78239, Communications was discussed
- Subcommittee 1 members requested a SME to be present at their next meeting and compiled a list of questions
- Members requested access to the relevant websites to begin work

- Subcommittee 1 changed their meeting start time to 12:30PM, EDT

#### Subcommittee 2

Jantel VanOrden provided the following updates for Subcommittee 2

- Four of five members attended Subcommittee 2 meeting
- Discussions of leadership roles were held and VanOrden volunteered to the lead this year. Members were excited to begin work
- A review of writing referrals was covered
- Call flow charts were discussed
- The Annual Report most serious problems
- The Taxpayers Bill of Rights was discussed
- They explored the 1041 and Online accounts for improvements
- Review of Projects: 78148, 74653, and 78239. A review of TCC referral will be done for further work
- Members requested a SME to attend their next scheduled meeting
- Copies of the SpeakUp brochures will be mailed out to members to begin Outreach activities

Earwood encouraged both Subcommittees to begin sharing their information to save effort and time. It was suggested to look into scheduling a combined meeting.

#### **TAP Director Comments**

Shawn Collins welcomed members and expressed her appreciation to all for being on the call. She is looking forward to the great work the members will be doing this year.

- Members were encouraged to bear with TAP while things are occurring with the new administration. TAP is impacted by some of the things happening in the background. Members were assured TAP is on top of it, working and are not stopping, TAP is needed, and no others do what TAP does. Members were encouraged as the voice for Taxpayers to spread the word and advocate about TAP
- The Business cards are on track to be distributed to members. Kevin Brown is working to get them out to everyone
- As information becomes available, Collins will make sure it is shared with members.
- Members with questions were encouraged to reach out and Collins will respond as soon as she gets the messages

#### **Program Owner Comments**

Cindy Jones expressed the following comments:

- Mejbeen is the liaison for this committee and works for Jones
- Encouragement extended to member to request a SME for their meetings and the things being done with Telephone routing. Jones informed the

members they are moving towards conversational routing. This allows the Taxpayers to speak the topic they want instead of the touch tone buttons to be routed to the area they need to go. It would be good to hear what is happening in this area

### **Outreach**

Slaney shared the following Outreach updates:

- Members were encouraged to enter updates to their Activity Reports on [www.TAPSpace.org](http://www.TAPSpace.org)
- Members were encouraged to reach out to their LTAs
- Matherne added she will reach out to the LTAs and get in touch with new members.
- Members having any issues should reach out to Slaney and Matherne
- A reminder was shared that the business cards and copies of the SpeakUp brochures will be mailed out to each member
- Members were encouraged to reach out to VITA volunteers and Income Tax Assistance who wants to hear from TAP. They will set up a spot for you and the opportunity to speak with Taxpayers about TAP will present itself
- Earwood added TAP has a lot of volunteers who work in those areas

### **Action Items**

Matherne stated he will complete the following action items:

- The TFPL minutes will be approved during next month's meeting
- Send an email for the available date for Subcommittee 1 and 2 to have their combined meeting
- Send an email to Conchata Holloway requesting a SME for both Subcommittee meetings

### **Roundtable**

Earwood asked for member comments:

- Collins stated due to the budget restraints a Face-to-Face meeting will not occur this year. She is looking into having a virtual meeting instead. It will be arranged with members daily activities in mind. Details will be shared along with updated information. Members were advised to remove April 21, 2025, through April 25, 2025, from their calendars
- Earwood shared information of his funding workshop with up to eight or nine companies. There were representatives from funding sources there. Tax issues were discussed
- Mark Sullivan shared he printed copies of the SpeakUp Brochures and distributed them during his visit at the local VITA site. He had a introductory meeting with his LTA. Their Outreach activities are on hold for



now. Sullivan will be informed of future Outreach events to participate in. He was introduced to the Director of the Mass Society of Enrolled Agents

Jimerson expressed appreciation to everyone for being on the call. Member with questions were encouraged to reach out to Matherne and or Jimerson.

### **Closing**

Jimerson officially closed meeting was officially closed at 1:30PM, EDT.

**Next Meeting: Tuesday, April 8, 2025  
1:00PM EDT, 12:00PM CDT, 11:00AM MDT, 10:00AM PDT**

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