



**Toll-Free Phone Lines (TFPL) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, April 8, 2025**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |                    |                    |        |
|--------------------|--------------------|--------|
| • Anthony Earwood  | San Antonio, TX    | Chair  |
| • Vahagn Aganikian | Las Vegas, NV      | Member |
| • Mark Sullivan    | Beverly, MA        | Member |
| • Jantel VanOrden  | Salt Lake City, UT | Member |
| • Thomas Wolf      | Canton, OH         | Member |

**Members Absent**

- |                  |                 |            |
|------------------|-----------------|------------|
| • Caroline Kim   | Honolulu, HI    | Member     |
| • Luis Marrero   | Lafayette, LA   | Member     |
| • Alisha Payton  | Westland, MI    | Member     |
| • Kandace Shawn  | Perris, CA      | Member     |
| • Charles Slaney | Wilsonville, OR | Vice Chair |

**Staff**

- |                         |   |
|-------------------------|---|
| • 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 |
| • Martina Coates Nance  | Supervisory Manager W&I Operation Support   |
| • Mejbeen Balsara       | Taxpayer Services Operations Support        |

**Quorum**

Quorum was not met.

**Welcome and DFO Report**

Susan Jimerson opened the meeting and welcomed members to the call and announced that the ICC Committee merged with the Outreach Committee. A brief overview of the agenda was shared.



### **National Office Report**

Susan Jimerson provided the National Office Report on behalf of Shawn Collins.

### **Chair Report**

Anthony Earwood welcomed everyone to the call and shared his appreciation for the committee's continued engagement and dedication. He expressed his enthusiasm for the work ahead and noted he is looking forward to building on the team's progress.

He provided the following updates:

- He recently met with his Local Taxpayer Advocate to discuss key initiatives and ongoing committee work.
- He has been actively involved in several projects aimed at enhancing taxpayer service on the toll-free lines.
- He is especially interested in having our committee develop a referral based on IRS surveys to better understand and improve customer service experiences.
- He reminded all members to log their hours in the activity reports and encouraged continued participation in upcoming projects and meetings.

He assured members he is available to assist when needed. He will respond to email within a day. Members with questions were encouraged to reach out to him.

### **Minutes Review**

TFPL November 24, 2024, February 11, 2025, and March 11, 2025, 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

### **Subcommittee Report**

#### **Subcommittees 1 and 2**

Mark Sullivan and Jantel VanOrden shared the following update: On April 1, 2025, Subcommittees 1 and 2 held a joint meeting in collaboration with members of the Taxpayer Communications Committee. During that meeting, the subcommittees were joined by a Subject Matter Expert (SME) from the IRS, who was invited to discuss the current IRS initiative involving the use of Voicebot and chatbot technology. This initiative explores the development and integration of AI-driven technology on toll-free lines to enhance taxpayer service and efficiency. Committee members engaged in substantive dialogue about the technology's current capabilities, limitations and potential taxpayer impact. The TFPL subcommittees will continue working to develop a formal referral, with the goal of offering actionable recommendations to the IRS.



### **Outreach**

Earwood 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
- A reminder was shared that the SpeakUp brochures will be mailed out to each member

### **Action Items**

Matherne stated she 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

### **Roundtable**

Earwood asked for member comments:

- Collins thanked the members for their ongoing participation and contributions, emphasizing the importance of collaboration in moving the committee's work forward. She acknowledged the thoughtful input shared during the meeting and encouraged everyone to stay engaged as the projects develop.
- Earwood encouraged members to reach out to local VITA sites and partner with the site coordinators, and the LTAs. Remember to log in all hours in the Activity Reports
- VanOrden echoed the appreciation for everyone's efforts and added that the strong participation and commitment from the members are what make the committee effective. She expressed optimism about the progress being made and looks forward to the continued teamwork.

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 1:25PM, EDT.

**Next Meeting: Tuesday, May 13, 2025  
1:00PM EDT, 12:00PM CDT, 11:00AM MDT, 10:00AM PDT**

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