



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, May 13, 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

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, March 11, 2025 and April 8, 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

Discussed **Issue 78148** *Live Chat and Chatbot*. The goal is to make it easier for professionals and taxpayers to get help from IRS on this. The members will continue to work on this and will send an email with their findings to VanOrden (and copy Matherne) by May 27, 2025.

Issue 78658 *Revise the IRS Level of Service (LOS) Metrics* Matherne discussed information from the NTA Most Serious Problems concerning different interpretations of the level of service that may be relevant to this issue. The members decided to work this issue.



Issue 78239 *Improving IRS Communication*. The members are working to determine the pain points for taxpayers in this communications process.

Outreach

Earwood shared the following Outreach updates:

- Members were encouraged to enter updates to their Activity Reports on 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, June 10, 2025
1:00PM EDT, 12:00PM CDT, 11:00AM MDT, 10:00AM PDT**