



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

Designated Federal Officer (DFO)

- John A. Lipold National Public Liaison

Attendance

- | | | |
|--------------------------|--------------------|-----------------|
| • Vahagn Aganikian | Las Vegas, NV | Member |
| • Anthony "Tony" Earwood | San Antonio, TX | Chair |
| • Caroline Kim | Honolulu, HI | Member |
| • Alisha Payton | Washington, DC | Member |
| • Kandace Shaw | Perris, CA | Member (Absent) |
| • Charles "Chuck" Slaney | Wilsonville, OR | Vice Chair |
| • Jantel VanOrden | Salt Lake City, UT | Member |
| • Thomas Wolf | Canton, OH | Member |

Staff

- Jose Cintron TAP Program Analyst
- Saul Hernandez Acting TAP Director

IRS Staff

- Mejbeen Balsara Taxpayer Services Program Analyst

Public

None

Roll Call

Quorum was met.

National Office & DFO Report

Hernandez reported the Speak Up Brochure English and Spanish versions have been revised and are nearing final completion for printing. Once printed copies are available, we will communicate and distribute to the members.

The National Taxpayer Advocate (NTA) has released the Objectives Report to Congress which can be accessed through the improveirs.org site or from irs.gov. If the members would like a hard copy, please send your name and preferred mailing address to your committee analyst.



Hernandez also mentioned TAP had a conversation with the Volunteer Income Tax Assistance (VITA) supervisor. Our plan is to work together in the future on improving their products and strengthen the relationship with TAP. We know many of the TAP members are currently involved with the VITA program.

Smith, Jr. reported TAP will be holding virtual JC Planning meetings which will take place on August 12th and August 19th for two and half hours. The meeting is usually held in person, but due to budget constraints will be held virtually. The meeting is open to each committee chair and vice chairs to plan next year's goals. TAP is asking members to bring to the table things that need work within TAP, to make improvements on processes and products. Any members can make suggestions and should submit to the committee chair and vice chair.

Chair Report

Earwood reported the combined subcommittees has been productive for the committee. We want to keep moving forward to get three referrals ready for submission and onto the IRS for quick implementation. The committee also has one rebuttal to address. 1993 Survey from August 11th notes the IRS improve Customer Service survey.

Approval of Minutes

- June 10th, 2025, Meeting Minutes- Slaney motioned; Kim seconded.

Action: Minutes approved as submitted

Comments From the Public

N/A

Subcommittee Updates

Subcommittees 1 and 2

Earwood reported

Issue 78148 Chatbot & Live Chat Technology

Project received from Taxpayer Services. Discussion held to combine efforts with Taxpayer Communications Committee.

Vote was held-Kim Motioned; Wolf seconded.

Issue 78239 Communicating with the IRS: Taxpayer and Tax Professional Perspective

Earwood mentioned the project aligns with the NTA report.

Vote was held-Wolf Motioned; Kim seconded.



Issue 78568 Revise the IRS Level of Service (LOS) Metrics on the Telephone Lines
Phone lines are crucial
Vote was held-Kim Motioned; Wolf seconded.

Started working on:
Issue 75140 Improving Phone System Services

Outreach

Matherne provided the Tax Forum dates. TAP does not have an official presence, but any member attendees can direct members of the public to the improve site.
Submit activities on TAPSpace. The TAP National chair and vice chair will be taking a closer look at the activity reports.
Earwood will complete the next newsletter; the following month will be completed by Slaney.

Action Items

June meeting minutes will be posted
Elevate 78148 contingent upon SA review
78239, 78568
Request for hard copy of NTA Objectives Report due by Friday close of business

Roundtable

Earwood stated things are moving along, and great things are about to happen. Update your activity report in TAPSpace and thanked everyone for their time.

Closing

Lipold closed the meeting at 3:29pm ET

**Next Meeting: Tuesday, August 12, 2025
3:00PM EDT, 2:00PM CDT, 1:00PM MDT, 12:00PM PDT**