

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, March 31, 2022**

Designated Federal Officer

- Susan Jimerson Chief TAP West

Attendance

- | | | |
|---------------------|-------------------|------------|
| • Donna Burris | Brooklyn, NY | Member |
| • Doris Carpenter | Florissant, MO | Member |
| • Debra Kurita | Fullerton, CA | Member |
| • Eugene Lillie | West Deptford, NJ | Member |
| • Angela Madison | Los Angeles, CA | Member |
| • Robin Mosley | Centerville, OH | Member |
| • Jon Ramirez | Maize, KS | Vice Chair |
| • Richard Rodriguez | Stockton, CA | Chair |
| • April Smith | Birmingham, AL | Member |
| • George Williams | Ridgeland, MS | Member |
| • Sara Zanders | Fort Smith AR | Member |

Members Absent

- | | | |
|---------------|--------------|--------|
| • Marlon Bell | Pearland, TX | Member |
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Staff

- | | |
|----------------------|--|
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Gilbert Martinez | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Kevin Brown | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment (W&I) Operations Support |
| • Cindy R. Jones | W&I Operations Support |
| • Tamikio Bohler | W&I Operations Support |
| • Gail Johnson | W&I Customer Account Services (W&I CAS) |
| • Rosemarie Rixey | W&I CAS |

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the Agenda was provided.

National Office

Terrie English welcomed members to the call and expressed her excitement in working with each member. She provided a brief introduction of herself.

- The Service is slowly opening back up and TAP is anticipating travel for face-to-face meetings and Outreach
- Members were reminded to obtain preapproval for any travel needs when participating in any Outreach events
- Each state has a Local Taxpayer Advocate (LTA), with some states having two LTAs, who will be hosting Outreach events

Self Introductions

Each member was given the opportunity to introduce themselves. The TAP Staff followed with their introductions.

Meeting Procedures and Ground Rules

Rosalind Matherne provided an overview of the TAP Ground Rules:

- Ideas, opinions and concerns are welcomed
- Allow each person to speak
- Time is valued and respected
- Telephone etiquette (mute phones when not speaking) *6 to mute and unmute
- Our method of communication is by using email (make sure to send a copy to TaxpayerAdvocacyPanel@irs.gov and to your Analyst)
- Everyone is encouraged to call in to meetings ten minutes prior to the start of the meeting. If anyone has problems signing onto WebEx, the Staff will be available and signed on thirty minutes prior to the start of the meetings to assist or answer questions relative to getting on
- Participation is required
- Members were encouraged to reach out to the Analyst or management with any questions
- Agendas will be shared with the Chair, Analyst and DFO prior to each meeting

- Copies of the Pre-reads will be shared with each member and should be reviewed prior to the beginning of meetings. They will be posted on www.TAPSpace.org and www.Improveirs.org
- The Full Committee will be divided into two Subcommittees – Subcommittee 1 and Subcommittee 2
- Quorum is required to approve referrals and Meeting Minutes
- Jimerson encouraged members to go onto www.IRS.gov when has a wealth of information available
- English added If anyone is unable to be on a call, they are advised to send a message to the Analyst and/or the Chair to let them know they will not be able to attend

Committee Chair and Vice Chair Election

Want to become a Chair or Vice Chair was opened for volunteer nominations or self-nominations. Matherne provided a brief description of the roles and responsibilities for both positions.

Congratulations to Richard Rodriguez, TFPL Chair for 2022 TAP year
Congratulations to Jon Ramirez, TFPL Vice Chair for 2022 TAP year

Minutes Approval

TFPL Minutes for November 9, 2021, were approved as submitted.
Rodriguez motioned and Robin Mosley second

Subcommittee 1 and Subcommittee 2 members assignment

- **Subcommittee 1:** Eugene Lillie, Debra Kurita, Doris Carpenter, Angela Madison, George Williams, and Donna Burris
- **Subcommittee 2:** Robin Mosley, April Smith, Jon Ramirez, Richard Rodriguez, Sara Zanders and Marlon Bell
- **Leads** for each Subcommittee will be established during the first Subcommittee meetings

Meeting Dates Assigned

- **TFPL Full Committee** meeting will be held every second Tuesday of the month beginning at 3:00 PM ET. Their first meeting will be held on April 12, 2022, at 3:00 PM ET
- **Subcommittee 1** will have their meeting every first Wednesday of each month beginning at 3:00 PM ET
- **Subcommittee 2** will have their meeting every first Tuesday of each month beginning at 3:00 PM ET

Outreach

Vice Chair, Jon Ramirez is the lead for the Outreach Committee. The schedule for the Outreach committee meetings will be shared soon.

Screening Committee

Debra Kurita, Robin Mosely, Jon Ramirez and April Smith volunteered to be the members on the Screening Committee

Internal Communications Committee (ICC)

Matthew O'Sullivan is the TAP Analyst over the ICC and he provided an overview of what the ICC committee does.

Angela Madison and Sara Zanders volunteered to be on the ICC

Quality Review (QR)

Angela Madison, Debra Kurita and Doris Carpenter volunteered for this committee

IRS Responses

The following Issues were reviewed. Jimerson shared some background of the referral form process. The following referrals were discussed:

- **Issue #50542** *Where is My Refund?" Tag Line*
The Committee accepted and approved Recommendations ID #2196 and sent back ID #2186 to Subcommittee 1 for review and possible rebuttal
- **Issue #50678** *Communication with 1040 Filers and Underserved Communities who do not have access to www.irs.gov and other electronic materials.* IRS did not adopt this issue. It was assigned back to Subcommittee 2 for review and request a Subject Matter Expert (SME)
- **Issue #48550** *Out of Scope Public Service Announcement of the Voice Response Unit (VRU)* was sent back to Subcommittee 1 for review and request SME
- **Issue #44245**, Natural Language Project was accepted and closed. Recommendations ID #2184 and #2185 were adopted

Program Owner

Michael Odom assured members a Subject Matter Expert (SME) would be beneficial in answering their questions. There will be a project from Wage & Investment (W&I) shared with the committee soon. SMEs will be in attendance at each Subcommittee, as requested.

Action Items

Matherne shared the following Action items:

- Forward TFPL November 9, 2021 approved Minutes to Kevin Brown for Posting
- Email information with committee assignments to each member
- Assign **Issue #50542** and **#48550** to Subcommittee 1 for further research and possible rebuttal and request an SME
- Assign **Issue #50678** to Subcommittee 2 for further research and request a SME to attend their meeting
- Closeout **Issue #44245** in the system as adopted

Roundtable

- Lillie encouraged members when submitting documents, make sure to submit them in Word or PDF format. Try and submit them early
- Jimerson encouraged members to get their TAP Email address established to assure information will be shared
- Matherne assured members the TAP Staff is available to assist.

Closing

Jimerson thanked members and the meeting was officially closed at 1:28 PM ET.

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