

**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, July 12, 2022**

Designated Federal Officer (DFO)

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|---------------------|-------------------|----------------------------------|
| • Donna Burris | Brooklyn, NY | Member |
| • Doris Carpenter | Florissant, MO | Member |
| • Anthony Earwood | San Antonio, TX | Member |
| • Debra Kurita | Fullerton, CA | Member |
| • Eugene Lillie | West Deptford, NJ | National TAP
V-Chair & 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 |

Members Absent

- | | | |
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| • Sara Zanders | Fort Smith, AR | Member |
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Staff

- | | |
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| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment Customer Services (W&I) |
| • Sherry Stadler | Attorney Advisory Group,
National Taxpayer Advocate (NTA) |
| • Kevin Gouge | Research & Analysis (NTA) |
| • Francis Cappelletti | Research & Analysis (NTA) |

Quorum

A quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided with the following DFO updates:

- July 20, 2022, the Ad Hoc Committee for the TAP Chairs and the Internal Communications Committee (ICC) will meet at 2:30 PM EDT
- July 21, 2022, beginning at 12:00 PM EDT the Outreach Committee will have their meeting. Dr. Eugene Lillie heads this committee. The project committees' Vice Chairs will be in attendance
- July 27, 2022, beginning at 12:00 PM EDT the ICC will have their scheduled monthly meeting. The ICC works on external and internal communications. They also work on the TAP Handbook
- July 28, 2022, beginning at 1:30 PM EDT the Joint Committee (JC) will have their monthly meeting. Martha Lewis heads the JC and the Committee Chairs attend this meeting

National Office

Terrie English welcomed members to the call and provided the following National Office updates:

- Training for the Tax Forums were held prior to this call. Members were encouraged to reach out to their Analyst, Rosalind Matherne for additional information
- TAP New Member Recruitment for 2023 has begun. Interviews will begin to be scheduled. Members were encouraged to participate in the process. There will be a lot of valuable information obtained by doing so. Members who are interested were advised to send an email to their analyst to be added to the list of volunteers
- Funding for the Joint Committee Planning Session has been approved. The meeting dates are August 9 - 10, 2022. The Committee Chairs have been invited to attend. Most of the meeting will be open to the public.

Chair Report

Richard Rodriguez welcomed members to the call.

- Members were thanked and reminded of the importance of having quorum for each Full Committee meeting
- Participation during the Tax Forums was encouraged.
- Interviews for new members begins on July 25, 2022. Member support is needed and appreciated
- Share any ideas, information, or suggestions via email to Rodriguez for the Joint Committee's Planning Session in August

- Thank you and appreciation expressed to members for documenting the Activity Reports with time spent doing research, outreach as well as work on the TAP Newsletter

Minutes Approval

The TFPL June 14, 2022, Meeting Minutes were approved as submitted.

Debra Kurita motioned and Robin Mosley seconded.

Member of Public

N/A

Program Owner's Report

Michael Odom stated the following:

- There are no open referrals, no reconsiderations and no implementations
- He shared two questions pending verbiage after verification. The first question asked what the IRS is doing to address senior citizens access. It is being addressed with changes to the system that allows language to be simpler and less complex. Constant work is being done to improve technology. There will be more details provided
- Odom was asked if the Web Chatbot project will be assigned to the TFPL Committee. He assured the Committee it would be given to them for testing
- The second question involves what email address inmates can use regarding the 4883C letter. There is an email address for the prison officials to use to assist the inmates in finding information on www.IRS.gov Odom will verify information stating whether inmates received the notice or not. He will share the response with the committee
- The written responses will be shared with the Committee

Subcommittee Report

Subcommittee 1

Debra Kurita stated that the Subcommittee 1 meeting was held on July 6, 2022, with the following updates:

- **Issue #55354** *Testing the Voice Bot Technology on the Toll-Free Lines*, both subcommittees worked this issue. Testing has been completed and ready to be elevated.
- **Issue #57616** *Certified Acceptance Agent Program Modification* referral was generated by Eugene Lillie who will work on the issue and forward to the subcommittee to share for review
- **Issue #59168** *Extend the Hours of the Customer Service to answer the 1040 phone lines*. Matherne will get back with the subcommittee with background information

- **Issue #59167 TAP Website Enhancements** The subcommittee is reviewing the TAP website page to discuss improvements and changes.
- Rodriguez stated that Subcommittee 2 worked with Subcommittee 1 on the Voice Bot referral which is ready to be elevated to the JC and approval of the referral is recommended. **April Smith made the motion and Kurita seconded**

Decision: Full Committee Consensus approved to forward Issue 55354 to the Joint Committee

Subcommittee 2

April Smith stated that the Subcommittee 2 meeting was held on July 5, 2022, with the following updates:

- Subcommittee 2 finalized testing for **Issue #55354 The Voice Bot Project** and noted it has been approved during the Subcommittee 1 report
- Subcommittee 2 is working on **Issue #50367 ID Verification via Phone Required by 4883C Letter**. Members were assigned sections of the referral to work, as follows: Smith has the Background; Robin Mosley assigned Barriers and Rodriguez assigned the Summary. Their research is due to be completed by July 19, 2022
- Subcommittee 2 is looking forward to working on the testing project from Odom

Screening Committee Report

Robin Mosely shared the following updates:

- The Screening Committee meeting was held on June 16, 2022
- A total of eighteen suggestions were screened; thirteen were closed
- **Issue #58793** involved a Taxpayer not being able to contact the Taxpayer Assistance Center (TAC) office. Matherne will follow-up with the TAS Hartford, CT office.
- Two other issues were identified: Taxpayer Assistance Appointment Hotline and the other one was Hotline were reassigned to TAC
- The Screening Committee will have their next meeting on July 21, 2022 beginning at 3:00 PM EDT

Smith made the motion and Robin Mosley seconded

Decision: Full Committee Consensus accept the Screening Committee Report as stated

Internal Communications Committee (ICC)

Angela Madison shared the following updates for ICC:

- ICC members are working on chapter eight of the TAP Handbook to suggest possible edits or updates

- Matthew O'Sullivan worked on the handbook screenshots and provided current updates.
- Members were asked to share any comments or ideas with the committee

Outreach

Vice Chair, Jon Ramirez provided the following updates for the Outreach Committee

- 90.91% activity records submission
- Rodriguez stated he participated during an Outreach event and spoke with a Taxpayer about TAP
- Angela Madison stated she attended an Outreach event on the environment that lasted over two hours. She was able to put the website on their screen and share what TAP does. Several people had valid issues dealing with the IRS. People were extremely interested in TAP
- Matherne thanked Dr. Lillie for attending today's meeting and informed the committee that Dr. Lillie is in Las Vegas attending an Outreach event which the NTA, Erin Collins is the keynote speaker.
- Anthony Earwood shared he attended an Outreach event where he was able to share with small business lenders information on TAP

Action Items

Matherne shared the following Action items:

- Forward TFPL June 14, 2022 approved Minutes with correction to reflect Carpenter as present to Kevin Brown for Posting
- Follow-up with Michael Odom for answers to members questions and share with committee
- Update the TAP database with Screening Report issues
- Elevate **Issue #55354** Voice Bot Technology project to the JC
- Conduct research on extending the hours of Customer Service Representatives (CSRs) and share before next Subcommittee 1 meeting

Roundtable

Rodriguez went around the table and asked each member if they had any comments

- Ramirez encouraged members to reach out to him with an email message if they have questions
- Rodriguez reminded members to forward to him any information they would like to go to the Joint Committee
- Sherry Stadler from the Attorney Advisory group shared information on what the Attorney Advisors reviewing. They are very interested in the work the committee is doing. They have been working with the NTA on the Most Serious Problems.

Jimerson thanked Stadler and members for their attendance. Appreciation was expressed to Rodriguez for a great job leading the meeting.

Close

Jimerson thanked members and the meeting was officially closed at 3:58 EDT

**Next Meeting: Tuesday, August 9, 2022
3:00 PM EDT, 2:00 PM CDT, 1:00 PM MDT, 12:00 PM PDT**

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