



**Toll-Free Phone Lines (TFPL) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, October 10, 2024**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-----------------------|--------------------|----------------|
| • Jantel VanOrden | Salt Lake City, UT | Chair |
| • Anthony Earwood | San Antonio, TX | Vice Chair |
| • Fritz-Gerald Delice | Dacula, GA | Member |
| • Charles Harvey | Albany, NY | Member |
| • Debra Kurita | Fullerton, CA | National Chair |
| • Alisha Payton | Westland, MI | Member |

Members Absent

- | | | |
|-------------------|-----------------|--------|
| • Charles Slaney | Wilsonville, OR | Member |
| • George Williams | Ridgeland, MS | Member |

Staff

- | | |
|-------------------------|------------------------------|
| • Shawn Collins | TAP Director |
| • Kelvin Johnson | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Jose Cintron Santiago | TAP Program Analyst |
| • Conchata Holloway | TAP Lead Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | W&I |

Quorum

A quorum was met.

Welcome and DFO Report

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

- IRS has expanded the 2025 Direct File Program. They have increased the number of states to include Alaska, Connecticut, Idaho, Kansas, Maine, Maryland, New Jersey, New Mexico, North Carolina, Oregon, and Wisconsin. For the 2025 filing season, Direct File will support 1099's for interest income greater than \$1,500, retirement income and the 1099 for Alaska residents reporting the Alaska Permanent Fund dividend



- October 15, 2024, TAP Informational Session on Being a TAP Chair or Vice Chair Election will begin at 1:00PM, EST
- October 16, 2024, The Annual Report Team will have their meeting beginning at 3:00PM, EST
- October 17, 2024, Outreach Committee meeting will have their meeting at 2:00PM, EST
- October 17, 2024, Internal Communications Committee will have their meeting beginning at 3:00PM, EST
- October 24, 2024, The Joint Committee monthly meeting begins at 3:00PM, EST
- There will be one the TAP year remaining after today's meeting

Chair Report

Anthony Earwood led the meeting until Jantel VanOrden joins the call to share the Chair updates. VanOrden joined the call and shared the committee is working on the following:

- VanOrden informed the members during the Subcommittee report out, the Subcommittees will be merged into one committee with the full committee. A separate committee meeting then full committee meeting to make final decisions. There will still be two meetings each month
- VanOrden contacted her LTA will start attending the meetings for her group. The LTA will allow her to attend his presentation in November and December to pass out cards to make aware of TAP
- Subcommittee 1 members consistency with turn around has been great. Things have been moving with Where's My Refund and Where's My Amended Return using the feedback. This is a great idea

Minutes Approval

TFPL September 12, 2024, Minutes were approved as submitted. Charles Harvey motioned, and Debra Kurita seconded

Public Comments

None

Subcommittee Update

Subcommittee 1

Earwood stated Subcommittee 1 and Subcommittee 2 will be combine for their report. Charles Harvey shared the following updates:

- Issue 74653, Streamlining the Phone Service, currently has eight options. There is an option number nine to speak with a customer service representative. Earwood commented on the wait time he experienced.
- Issue 76133, Where's My Refund, Where's My Amended Return, a list of comments was developed by Kurita to be use as the referral. Kurita added

the list was put together by number. Suggestion to make the recommendation to review the system to recognize the voice. Harvey will assist Kurita in writing the referral

- Issue 62577, Standardized Customer Service Survey members stated they did not have time to review and will table for next subcommittee and full committee to accept or rebut. Kurita discussed the two recommendations and wanted to accept under consideration. Earwood they will need to check on 288. Decision will be made by the next full committee meeting

Jantel VanOrden joined the call.

Subcommittee 2

Alisha Payton shared the following updates:

- Issue 67028, – The Right to Quality Service stated she needed to put it back to VanOrden, who explained that she still has some edits to complete, and the 7 recommendations should be ready by the subcommittee meeting scheduled for November.
- Issue 60190, IRS Homepage and TFPL Customer Service Improvement, edits were completed by Kurita. Kelvin Johnson added them to the referral and shared copies with members. Payton asked for vote to move to the Joint Committee for approval.

VanOrden motioned, and Kurita seconded to send this referral to the Joint Committee on October 24, 2024

Decision: Full Committee Consensus move Issue 60190 to the Joint Committee for approval

- AE discussed outreach and JV shared that she is working with both the LTA and IRS liaison. AE discussed his outreach efforts such as attending Tax Credits and Reduction seminar, working with SPEC who has flyers that TAP members can use in their outreach efforts. He also explained that he is doing outreach with 5 companies associated with SCORE. Get your activity hours posted

Outreach Report

Anthony Earwood shared the following Outreach Report:

- Members were encouraged to continue to reach out to their LTA and work with them to get on their schedule if not for this year, for next year events participation. This is important in doing Outreach
- Members were encouraged to get their Outreach hours in and onto the Activity Report as the end of the year is approaching
- Members were informed a lot is happening with different groups, division and ways being tried to improve IRS, Taxpayer Service and how money is spent. There are a lot of changes taking place with improvements and getting Taxpayer feedback on how they are experiencing the changes.

Earwood added there were a lot of representatives there. He tried gathering information from some of the scams and some of the additions to Tax credits

- SPEC organization within IRS that has done a wonderful job trying to get wires out. Members were encouraged to stay involved and be aware of what is happening to report back on good things also. There is a relationship between a lot of organizations and TAS that could be shared with the Taxpayers
- Earwood has been busy with SCORE doing Outreach. A lot of companies go through them.
- Members were encouraged to continue to work with local groups and partnerships and get their activity hours in to surpass last years' total Outreach hours

Screening Report

Earwood shared the following update for IRS responses

- There were nineteen issues addressed on www.TAPSpace.org
- A group was combined into one for phone service
- The others were closed
- Four were put into 71360 and three were closed
- One was placed in the Parking Lot
- Kurita added everything was basically closed except two. One on disconnects and the other on a series of things for TAP 2025 to explore

Kurita motioned to accept and Charles Harvey seconded

Decision: Full Committee Consensus accept the Screening Report as submitted

Internal Communications Update

Payton shared the following:

- ICC is continuing to work on Issue 68481, Allow Members of the Public to join an Email List for TAP Members, ICC recommendation is to put information on www.IRS.gov website to direct the public to resources available in addition to reaching out to TAP panelists. They are still in the process of gathering additional information and will be ready for full committee vote during next month's meeting
- Volunteers are still needed to assist with the Facebook page. Members were encouraged to assist and share the information with other member committee members
- The Newsletter article for November is due on October 25, 2024. VanOrden will do the submission for November

Action Items

Kelvin Johnson shared the following:

- Forward TFPL approved September 12, 2024, Minutes to Kevin Brown for posting on www.Improveirs.org and www.TAPSpace.org
- Update the system with the approval of the Screening Committee Report and get updated report prepared
- Work on and submit referral form for Issue 74653
- Kurita and Harvey will work the referral for Issue 76133
- Committee will wait and deliberate on Issue 62577 to be on the joint Subcommittee meeting
- Send edits on Issue 67028 for the pre-reads when VanOrden submits them
- Issue 60190 was approved and will be forwarded to the Joint Committee for their review
- Obtain from Earwood the catalog number for the SPEC flyer and share with the link for downloading

Roundtable

VanOrden asked for comments and or questions.

- Collins expressed her appreciation to members for all the work they continue to do for the TAP process. Appreciation to the third-year members was given. The TAP National Chair and Vice-Chair Elections will be held soon. Encouragement to the second and or third-year members to consider the TAP National Chair or Vice Chair position if they have interest in either position. There will be an informational session for interested members to attend
- Kurita expressed appreciation to members and to consider submitting their name or nominating a member for either the Chair or Vice-Chair position. Members were also reminded to submit their time on the activity reports
- Thank you for all you do for TAP

Jimerson thanked everyone for their contributions and encouraged each member to know TAP continues because of its members. Members were reminded there is one remaining full committee meeting for this TAP year.

Close

Meeting was officially closed at 4:56PM, EST.

**Next Meeting: Thursday, November 14, 2024
2:00PM EST, 3:00PM CST, 09:00AM MST, 08:00AM PST**

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