

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday March 30, 2023, 11:00am ET**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|----------------------------|---------------------|-----------------|
| • Sarah Berry | Fouke, AR | Member |
| • Jason Brinkley | Gainesville, TX | Member |
| • Cheryl Crowe | Felton, DE | Member |
| • Asissata Diaby | Harrisburg, PA | Member (Absent) |
| • Manuel "Manny" Dominguez | Gladstone, MO | Member |
| • Kristin Gentile-White | Gilbert, AZ | Member |
| • Steve Hoffman | Westford, MA | Member (Absent) |
| • Eric Koo | Winter Garden, FL | Member |
| • Shelly McCracken-Rania | Fountaintown, IN | Member (Absent) |
| • Steven Sklar | New York, NY | Member |
| • Eugene Lillie | National Chair | Visitor |
| • Angela Madison | National Vice-Chair | Visitor |

Staff

- | | |
|---------------------------|----------------------|
| • Kevin Brown | Management Assistant |
| • Frank Bustos | Acting TAP Director |
| • Kelvin Johnson | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |
| • Kudiratu Usman-Olugunna | TAP Program Analyst |

Welcome/Announcements/Comments/Acknowledgement of Citizens

Jeans opened the call and welcomed everyone and reviewed the agenda for today.

Roll Call

Brown completed roll and quorum was met.

Self-Introductions

The TAP staff and TAP members introduced themselves and shared a small bit about themselves as a self-introduction.

TAP Mission

Cedric Jeans reviewed the TAP mission and reviewed the basic functions of TAP. The TAP listens to taxpayers, identifies taxpayers' issues, and makes suggestions for improving IRS service and customer satisfaction.

TAP Members

Commit to volunteer time; Identify grass root issues; and prepare Annual Report. This is done under the Taxpayer Advocated Services (TAS) which provides the funding, support services and the Designated Federal Officers (DFO).

According to the TAP Charter

TAP Objectives

Provide a taxpayer perspective on critical tax administrative programs.
Provide listening opportunities for independent taxpayer comments.
Allows direct access to the appropriate operating division.

TAP Success Stories

Longer extension of time to file tax returns.
Improvement and recommendations to numerous forms and instructions.
Updated filing requirement verbiage on form 7004.
Customer callback feature for toll-free phone lines.

Project Committees

Work issues assigned from the TAS of the IRS
Work with IRS program Owners and Subject Matter Experts
Screen new issues.

Recommendations

Work issues assigned from TAS or the IRS.
Work with IRS program owners and subject matter experts.
Screen new issues.

Committee decides whether to pursue the issue or drop it.
Should focus on customer service improvement.
Should be fully developed, clearly written and significant for the taxpaying public.

Staff Support

Appoint DFO for the project committees.
Work with the panel and IRS to promote efficient project efficient project committee.
Facilitate communication among all parties involved in the committee.
Final review of recommendations referrals to ensure that all information matches the database.
Research and analysis of issues

Facilitate communication between IRS and TAP
Review or recommendation referrals
Assist members in meetings.
Consolidate outreach reports.
Prepare travel documents/reimbursements.

TAP Meeting Procedures

Ann Tabat reviewed

- Ground Rules

Listen to the ideas and opinions of your fellow panel members and give everyone the time to speak their minds. Above all, be respectful of one another.

- Telephone & E-Mail Etiquette

Please arrive five minutes ahead of your call.

Identify yourself.

Limit the side bar conversations.

Mute yourself when not speaking.

Participate and don't get discouraged.

Do not reply all or cc everyone unless necessary.

Consider others time and feelings during these meetings.

- Minutes/Minutes Approval

Please review the meeting minutes, agendas and pre-reads prior to each meeting. The Chair, DFO and analyst will work on some pre-reads.

- Establish Quorum & Consensus

Quorum is 50 percent plus one.

- Agenda & Pre-Read Information

This information will be shared during the meeting via MS TEAMS.

Prereads and other meeting materials will be available on www.TAPspace.org.

Other website members will use are www.irs.gov and www.improveirs.org.

- Activity Reports/Time Reporting

Complete on the www.TAPspace.org site. Document all TAP time to include meetings, subcommittee meetings and outreach.

- Methods of Communication

The primary means of communications will be by email; telephone; fax; and MS TEAMS

So, You want to Be A Chair?

Rosalia gave an overview of what the responsibilities are for TAP leadership positions.

Nominations and Election process (Chair/Vice-Chair)

- Nominate Candidates

Steven Sklar self-nominated for Chair or Vice-Chair.

Kristen Gentile-White self-nominated for Chair.

Steven agreed to change the self-nomination to Vice-Chair.

The committee started voted by email, however determined no opposition to each position so vote was documented in MS Teams poll.

Gentile-White and Sklar confirmed as committee leadership.

Subcommittee- self-nominated

Subcommittee- self-nominated

Approval of Minutes

November 8, 2022, minutes up for approval. Crowe motioned; Gentile-White seconded.

Action: November minutes approved as amended.

TAP Screening Process

Tabat reviewed the screening process in detail

Committee made up of three members to review issues submitted via outreach, calls to the toll-free line or from the IRS.

Determine if it is a TAP issue and decide if it stays with this committee or another TAP committee. Route it to another committee if more appropriate. Drop issue if it does not meet the TAP criteria.

Issue may require research to determine if it is something for TAP to work.

Establishment of Subcommittees and Meeting Dates:

- Full committee Second Thursday at 3:00pm ET

- Sub Committee 1- First Thursday 1pm ET

Cheryl Crowe; Aissata Diaby; Manny Dominguez; Kristen Gentile-White; Steven Hoffman.

- Sub Committee 2- First Thursday 3pm ET

Steven Sklar; Sarah Berry; Jason Brinkley; Eric Koo; and Shelley McCracken-Rania

Screening Committee

Kristen Gentile-White
Manny Dominguez
Steven Sklar

Quality Review

Cheryl Crowe; Shelley McCracken-Rania

Internal Communications

Tabled

IRS Responses:

Determined would cover and address at next meeting.

- Issue 53484-LTR 3030C (Bal-Due/Interest Due)

TAP Project Proposals:

Advised pre reads would be sent out after meeting invites and uploaded to TAPSpace.org

- Issue 66192 Difficult/Challenging Letters/Notices
- Issue 52479 Review of Notice CP503

Sklar spoke about a possible change to the quorum which may be discussed later. Gentile-White requested a Subject Matter Expert (SME) for CP2000.

Action Items

- Post November minutes

Closing

Jeans thanked everyone for attending the meeting and acknowledged the meetings for next week. Jeans officially closed the meeting at 12:59pm ET.

**Next Meeting: April 13, 2023, at 3:00pm EST/2:00pm CST/1:00pm
MST/12:00pm PST**

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