



**Notices and Correspondence Committee (NCC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday May 18, 2023, 2:00pm ET**

**Designated Federal Officer (DFO)**

- Fred Smith Acting DFO

**Attendance**

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

**Staff**

- |                   |                                      |
|-------------------|--------------------------------------|
| • Ann Tabat       | TAP Program Analyst                  |
| • Robert Rosalia  | TAP Program Analyst                  |
| • Kurt VanMatre   | Executive Director Systemic Advocacy |
| • Mejbeen Balsara | W&I Program Owner Liaison            |

**Welcome/Opening- DFO**

Fred Smith opened the meeting and welcome everyone at 2:00pm ET.

**Roll Call**

Ann Tabat completed roll and quorum was met.

**Members of the Public**

Phillip Wong Optima Tax

**Welcome/Announcements/Comments/Acknowledgement of Citizens**

Kristin Gentile-White welcomed everyone and reviewed the agenda. Phillip Wong identified self as member of public from Optima Tax. He stated he was an alternative representative of TAP located in California.

### **DFO Report**

Prior day the committee met and had training sessions. Nothing further to report.

### **Approval of Minutes**

April 2023 Minutes not available for meeting will be tabled until the next full committee meeting in June. Analyst will provide as pre-read.

### **Chair Report Out**

Gentile-White solicited members to occupy a permanent position on the Internal Communication Committee (ICC). Crowe attended April's meeting but was unsure of her availability. Crowe indicated she would continue to serve on ICC but needed a back-up for those times she would be unable to attend. Shelley McCracken-Rania confirmed she would step in. ICC meeting confirmed for the 3<sup>rd</sup> Tuesday of the month at 12pm ET.

### **Outreach Report**

Steve Sklar encouraged members to seek outreach opportunities. Sklar reminded everyone to report time properly in TAPSpace after each TAP related activity. He reminded the committee that the newsletter articles are due to him by the 25<sup>th</sup> of each month. Sklar advised the leads of the subcommittees to send their drafts to him and he will forward the final copy to the analyst.

### **Subcommittee 1**

Issue 63395 CP 2000 Paragraph Language

Manuel Dominguez advised that a Subject Matter Expert (SME) will be attending the subcommittee meeting on June 1<sup>st</sup>, 1pm ET. Questions have been forwarded for review. The committee will continue to review to make any additional changes and updates to the issue.

Issue 66192 Difficult/Challenging Letters/Notices. Dominguez discussed adding additional letters and notices as determined. W&I Program Owner Liaison Mejbeen Balsara stated she has a listing of problematic letters she could provide. The committee will review determined letters that are currently in the parking lot. (Discussed in both subcommittee report outs)

### **Subcommittee 2**

Issue 53484 LTR 3030C (Bal-Due/Interest Due) Rebuttal to IRS response.

Shelley McCracken-Rania discussed reducing the recommended language on the recommendations that the committee added to all correspondences informing taxpayers of their online account. The online account recommendation rebuttal will be used in all future recommendations by the committee. The committee is continuing to review the response for additional rebuttals.

Issue 52479 Notice CP503 Individual Balance Due-Second Notice, the committee will continue to work on and provide their recommendations via the short form for the analyst to compile and review during the subcommittee meeting June 1st.

### **TAP Screening Report**

Tabat reviewed the screening report with entire committee.

The following determinations were made:

Issue 64824 CP 13 Notice added to the parking lot.

Issue 64767 and Issue 63823 needed clarification to identify notice or letter from the submitter.

Tabat will reach out to the submitters for clarification. Aissata Diaby and Eric Koo requested an opportunity to join the screening committee in the future.

### **ICC Report out**

Cheryl Crowe reported ICC is working on the speak up brochure. Updating some of the language, pictures used on the cover and UPC code. ICC is in the process of soliciting members to be administrators of the TAP Facebook account.

### **Chair Annual Report Template**

Tabat advised the members the chair Kristin Gentile-White is responsible for committee write up in the annual report. Gentile-White may need member's help with writing about the projects the committee has worked on. Tabat advised a template is in the works that will be introduced in the Joint Committee meeting that can be used to format the information.

### **Action Items**

Tabat will include April 2023 meeting minutes for June pre-reads. Will discuss with Office of Taxpayer Correspondence (OTC) to continue their presentation at another time. OTC presented a background of notices prior to the full meeting however was unable to continue due to time constraints. The members feel the presentation material will be beneficial in assisting with their future referrals.

### **Public Comment**

Phillip Wong thanked committee for allowing him to attend. He discussed he was familiar with ID.me feature, agrees CP2000 needs updating, has experience with Document Upload Tool (DUT) interacting with the taxpayers. The IRS provides a unique code via URL listed on the letter issued for DUT or may be provided over the phone. He hopes to see these updated features incorporated on more notices and correspondence.

### **Roundtable Closing**

Gentile-White stated they will incorporate the online statement in all referrals. The committee will continue to work on assigned issues to work towards referrals.

### **Closing**

Smith thanked everyone for attending the meeting and officially closed the meeting at 2:46 pm ET.

**Next Meeting: June 8, 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.**