



**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday July 13, 2023**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

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

Member Absent

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|---------------|-------------------|--------|
| • Sarah Berry | Fouke, AR | Member |
| • Eric Koo | Winter Garden, FL | Member |

Members of the Public

- Donna Patterson
- Philip Hwang

Staff

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| • Frank Bustos | Acting TAP Director |
| • Cedric Jeans | TAP East Chief |
| • Kelvin Johnson | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |
| • Annie Gold | Management Assistant |
| • Mejbeen Balsara | Wage & Investment (W&I) Program Analyst |

Welcome/Announcements/Comments/Acknowledgement of Citizens

Cedric Jeans opened the meeting and welcomed everyone. A reviewed of the agenda was shared.

Roll Call

Annie Gold completed the roll and quorum was met.

National Office Report

Frank Bustos welcomed members to the call and shared the following:

- Expressed thanks to members participating in the National Tax Forums
- Rita Green updated the committee on the activities from the New Orleans Tax Forum. The National TAP Chair will attend the Tax Forum in Washington, DC. Bustos will be looking forward to hearing any updates.
- Bustos provided an overview of items going to Congress as part of the Inflation Reduction Act. IRS was required to file a report relative to the Direct E-File program. Some of the Representatives are concerned about IRS expanding the program by introducing aspects requiring third parties provide E-File access that may lead to unauthorized third party access, his issue has been made known to Congress.
- Bustos stated he had a conversation with the Australian Department of Revenue, and they have a Direct E-File program that works well with low income Taxpayers
- An Email message was sent to members explaining his Detail has come to an end. He expressed thank you and appreciation to members for the last six months. He anticipates great things to come from the committee

DFO Report

Jeans expressed thank you and appreciation to Bustos for his support during his Detail and that he will be acting Director until a permanent selection has been made.

- The Tax Forums are in process and members were informed to look forward to information that will be shared
- Jeans explained there is an All-TAP Quarterly meeting being developed. The purpose is to provide information to all members on what is going on within IRS. Some will be invited to join TAP meetings. The agenda is being worked on for around the third or fourth week of August
- TAP Staff is moving into a new direction and looking into branding. The Staff has started more into www.ImproveIRS.org. They will make changes and make it easier for the public to understand what is being done. Members were advised to provide various articles of Outreach activities being conducted and include pictures to share. Steven Sklar was asked to provide pictures from the booths during the New Orleans Tax Forum. Members assistant in building up the website is needed.

Chair Report

Kristin Gentile White welcomed everyone to the call and shared the following:

- AD Hoc meeting is tentatively schedule for July 21, 2023, beginning at 11:00 AM, EST to get together and discuss the CP2000 and other things to work through. Ann Tabat will send a calendar invite to members.

Public Comments

Philip Hwang joined to observe.

Approval of Minutes

NCC June 08, 2023, Minutes were approved.
Steven Sklar motioned, and Jason Brinkley seconded.

Review of IRS Responses

Tabat shared the following included in the Pre-reads:

- Issue #63525, TAP Awareness Tax Professional IRS Website the IRS adopted and has implemented. It has been added to their website. Cheryl Crowe motioned and Sklar seconded

Decision: Full Committee Consensus accept IRS response

Subcommittee 1: Report

Manny Dominguez shared the following:

- Excessive Inserts and Stuffers, a SME, John Kilcoin from IRS Correspondence and Productions Services who introduced a project where IRS is requesting the committee's assistance to reduce the number of printed inserts called stuffers. The subcommittee will review the project for any alternatives, overlaps, or repetitive language prior to eliminating.
- Issue #63395 CP2000 Paragraph Language Ongoing work, the subcommittee met with SME, Orlando Gonzales and discussed the CP2000. There is a letter going out with the QR code. Taxpayers can upload documents as opposed to mailing them in. The AD Hoc meeting on July 21, 2023, will be focused on completing the work. Information will be shared with the subcommittee prior to the meeting
- Issue #52362 CP14 Balance Due work is ongoing
- Issue #66192 Top 20 Notices and Letters most confusing, the subcommittee has twelve issues with no movement. Subcommittee 1 will continue work on this issue
- Issue #52479, CP503 Individual Balance Due Second Notice
- Issue #53181, CP80 Unfiled Tax Return Credit on Account
Both issues are ready to move forward. Both referrals were sent to QR for review and waiting for their response with the SA and Attorney Advisor's response. Contingent upon the reviews recommendation to move forward to the Joint Committee.

Steve Hoffman motioned and Aissata Diaby seconded.

Decision: Full Committee Consensus to move both issues forward to Joint Committee for approval

Subcommittee 2: Report

Shelly McCracken -Rania stated Subcommittee 2 had a productive meeting. They were able to listen in on Subcommittee 1 meeting with the SMEs.

- Issue #52479 CP 503 Individual Balance Due-Second Notice and Issue #53181 CP80 Unfiled Tax Return Credit on Account both issues are with QC review. They are ready to move forward pending the review
- Issue #52425 CP12 Overpaid Math Error – Refund Due, this issue has been assigned and work is being done. Thank expressed to Sklar for working this issue

- Issue 66192 Top 20 Notices and Letters most confusing, Subcommittee 2 is waiting on the process to begin work
- Jason Brinkley is working on the CP13 the map area
- They are looking forward to the AD Hoc meeting and the work from the top 20 Notices
- Issue #64824, CP13 Math Error Balance and Issue # 68190, LTR 4314C Automated Under-reporter Interim Letter. They are working on the proposals to send to Subcommittee 2. Brinkley volunteered to take the lead on both

Outreach Report

Sklar shared the following updates:

- The meeting in New Orleans was a good meeting. There was a lot of interest there at the Tax Forum. Pictures were taken and will be forwarded to Tabat to determine how to share.
- Sklar requested assistance from Tabat in completing his report on www.TAPSpace.org
- Jeans encouraged members needing assistance entering their time on www.TAPSpace.org should reach out to the Analyst for the committee, Kelvin Johnson. Jeans expressed how at the end of the TAP year a review of all activity reporting is conducted. The number of hours contributed to the program is awarded at the end of the three-year term with a gold, silver, or bronze metal. Each metal has a requirement of hours. The current President signs off on each recognition.
- Gentile White inquired about the Repository of Contact Sources. Over the years, the Repository is a collection of contacts available for each of the states. Members are encouraged to reach out to Tabat or Johnson, and they will be glad to provide the contacts to you.
- Members were encouraged to supply any group pictures from the FTF in Washington, DC. Jeans suggested each member upload any pictures to www.TAPSpace.org. Gentile White suggested to include Rebecca Lammers and Angela Madison email when sending pictures
- Johnson will alert Matthew O'Sullivan of issues members are having with www.TAPSpace.org

Screening Report

Tabat will schedule the Screening team meeting on July 24, 2023 beginning at 11:00 AM, EST with Gentile White, Steve Hoffman and Manny Dominguez

Internal Communications Report

Cheryl Crowe shared the following:

- During the last meeting ICC went through procedural information
- The Speak-Up Brochures was updated and conversation around the titles and possible name change. The graphics and the cover have been changed.



Roundtable

Jeans expressed Ann Tabat has accepted a different position and will no longer be with TAP. Kelvin Johnson will be taking over the Analyst assigned for NCC. Members needing ID Badges or Business cards were reminded to reach out to Johnson. Jeans officially closed the meeting at 2:59 PM, EST.

Next Meeting: August 10, 2023, at 3:00 PM, EST/2:00 PM, CST/1:00 PM, MST/12:00 PM, PST

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