



**Notices and Correspondence Committee (NCC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday October 12, 2023**

**Designated Federal Officer (DFO)**

- Robert Rosalia Acting TAP East Chief

**Attendance**

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

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | Management Assistant                       |
| • Kelvin Johnson         | TAP Program Analyst                        |
| • Priscilla Medrano      | TAP Program Analyst                        |
| • Antoinette "Toni" Ross | TAP Program Analyst                        |
| • Ann Tabat              | TAP Program Analyst                        |
| • Mejbeen Balsara        | Program Analyst Wage and Investments (W&I) |

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

Robert Rosalia opened the call and welcomed everyone to the meeting.

**Roll Call**

Brown completed roll and quorum was not right away. Shortly after the meeting started, quorum was made.

**National Office/DFO Report**

Rosalia reminded the committee of how important making quorum is so that committee work can be done. Rosalia suggested the committee screen as many issues as they can so they can start off next year as clean as possible. The Chair and Vice-Chair elections will happen very soon. On October 24, 2023, at 1:00pm ET, there will be an information session as an introduction for any members interested in TAP leadership for next year.

Rosalia suggested anyone interested to attend. You will learn more about the roles and responsibilities of these positions.

You will be able to nominate or self-nominate. If you choose to run, you'll need to participate in the campaign process. This will allow you to share with the TAP how you qualify for and what you would bring to the position. The balloting period will be from November 3-9, 2023.

### **Approval of Minutes:**

- August 10, 2023- Hoffman motion; Sklar seconded.

**Action: Minutes approved as submitted.**

- September 14, 2023- Sklar, McCracken-Rania and Hoffman seconded.

**Action: Minutes approved as submitted.**

### **Chair Report**

NA

### **NCC News and Updates**

Review activities of Joint Committee. **(Approved by Joint Committee-September 2023 and sent to IRS)**

### **Awaiting IRS Responses:**

**Issue 53181 CP 80 (Subcommittee 2)**

**Issue 52479 CP 503 (Subcommittee 2)**

**Issue 68190 Letter 4314C (Subcommittee 2)**

All referrals still awaiting the IRS.

### **IRS Responses Received:**

**Issue 58801 Letter 3127C-** White will review for possible rebuttal.

**Issue 57391 Letter 1962C-** Subcommittee 1 to review for possible rebuttal.

**Issue 53485 Letter 2273C-** Subcommittee 2 to review for possible rebuttal.

### **Outreach Report**

- TAP Newsletter- Due October 18, 2023

Sklar requested assistance from Dominguez and McCracken-Rania to complete this report for the newsletter. Dominguez sent a response to Sklar via email.

- Activity Report (report time to NCC)

Sklar reminded everyone to complete the activity reports for all TAP related work.

- Outreach

Sklar explained that outreach includes outreach, meetings, internal work, and preparation for meetings. Sklar suggested doing as much outreach as possible to get the word out about TAP.

- Repository of Contacts & Sources-

Send request to Johnson via email.

McCracken-Rania will attend a military event on November 3, 2023, with her state representative and the Local Taxpayer Advocate (LTA). Dominguez is working with a local TAS representative and is wondering exactly what activity we add to our activity report. Sklar and Rosalia clarified anything done for TAP no matter how large or small, counts as outreach. White suggested taking pictures and writing a blurb about these events.

### **Internal Communications Committee (ICC)**

Facebook administrator duty – will be working on TAP toolkit.

Crowe reported we have a schedule and a frequency for posters on to the site. White further explained that each member takes a month to make the posts and the committee worked on organize and schedule posting on the page. It will post every Monday, Wednesday, and Friday.

Rosalia suggested working on the items that need to be approved since we are running short on time.

### **Subcommittee 1**

Dominguez reported:

Issue 63395 CP2000 – Committee approval needed; ready to send to JC.

White motioned; Sklar seconded.

**Action:** Approved pending Systemic Advocacy (SA) and Attorney Advisors (AA) as Quality Review (QR)

Issue 68350 Letter 5071C – Committee approval needed; ready to send to JC.

Hoffman motioned; Sklar seconded.

**Action:** Approved pending QR review

Issue 66990 Excessive Inserts & Stuffers – Referral for inserts/stuffer response to IRS. This issue is almost complete for committee approval.

Issue 52362 CP14 – This issue is awaiting feedback from Hoffman.

Issue 58801 Letter 3127C –White is fixing this issue to make it shorter.

Issue 68069 CP 25 –Dominguez, Hoffman or Sklar will work this issue.

Issue 68463 CP504 – Working.

Issue 68681 CP05 – Working.

Issue 63526 IR-22022-170 – Need special language for this rebuttal.

### **Subcommittee 2**

Johnson reported:

Issue 52425 CP12 – Ready to send to JC. Sklar motioned; White seconded.

**Action:** Approved pending QR review

Issue 64824 CP13 – Committee approval needed; ready to send to JC. Hoffman motioned; White seconded.

**Action: Approved pending QR review**

Issue 68460 CP 22A – McCracken-Rania indicated this is still being worked.

Issue 53485 Letter 2273C – Assigned to McCracken-Rania

Issue 57391 Letter 1962C – Assigned to Crowe.

### **Screening Report**

Johnson reported a meeting needs to be scheduled soon.

### **Action Items**

- Post the August and September minutes.
- Issues 63395, 68350, 52425 and 64824 elevated to JC pending QR.
- Schedule screening committee meeting date. Sklar will join.

### **Chair Closing Comments & Roundtable**

White invited anyone on the committee to join the next JC meeting on October 23, 2023. White encouraged returning members to come back to be even more effective. Sklar will join White on the next JC meeting. Johnson thanked the committee for all of their hard work.

### **Closing**

Rosalia thanked the committee for attending the meeting and closed the call at 3:56pm ET.

**Next Meeting: November 9, 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.**