

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday November 9, 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 |
| • Shelly McCracken-Rania | Fountaintown, IN | Member |
| • Steven Sklar | New York, NY | Member |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | Management Assistant |
| • Shawn Collins | Acting TAP Director |
| • Kelvin Johnson | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Mejbeen Balsara | Program Analyst Wage and Investments (W&I) |

Welcome/Announcements/Comments/Acknowledgement of Citizens

Cedric Jeans opened the call and welcomed everyone to the meeting.

Roll Call

Brown completed roll and quorum was made.

Approval of Minutes:

- October 12, 2023- Hoffman motion; Sklar seconded.

Action: Minutes approved as submitted.

National Office/DFO Report

Collins thanked the committee for all of their work and highlighted the graduating members. Collins encouraged the returning members to step up to leadership positions for the next TAP year. Collins asked members to join the graduation ceremony on November 28, 2023, at 1pm ET for the third-year members. Collins asked the members to complete the end of year survey when they receive it so they can be used to help us improve the program.

Collins asked the returning members to continue to do outreach and keep their activity reports updated during the down time. Collins stated that today was the last day to vote for TAP leadership for next year, and the results will be shared on Monday, November 13, 2023. Collins encouraged everyone to vote your conscientious as you know who is running. The annual report is being worked and members should share anything they want to be included with their Chair so it can be added. Collins looks forward to serving with TAP next year. Collins asked members to check their email as we will be sending updates for the upcoming TAP year via email.

Jeans thanked the committee and noted the taxpayers can see the work of this committee directly as they work on documents that taxpayers use all the time.

Chair Report

White reported sharing the annual report with the committee and welcomes feedback before it is finalized. White reported working on several issues currently and several that may be carried forward to next year. White noted Issue 53181 CP80 was accepted by the IRS and will be implemented in September of 2026. White shared we are awaiting IRS responses to five referrals.

Outreach Report

- TAP Newsletter- Due November 13, 2023

Sklar welcomes any input from the committee for the newsletter.

- Outreach

Sklar reminded everyone to complete the activity reports for all TAP related work no matter what it is and what forum it is. Sklar asked members to please update their activity reports for the activity report. Sklar said outreach is anything and everything done for TAP work.

- Repository of Contacts & Sources- Send request to Johnson.

Internal Communications Committee (ICC)

White spoke about the Facebook social media committee and took October to post on the Facebook page. White shared that Rebecca Lammers trained them on how to schedule posts. White encouraged members to get involved with this committee as it is pretty informative.

Subcommittee 1

Dominguez reported:

Issue 68350 Letter 5071C. Hoffman motioned; Sklar seconded.

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

Issue 66990 Excessive Inserts & Stuffers

Hoffman; Sklar seconded.

Action: Approved to elevated to JC pending QR

Issue 52362 CP 14- Still being worked.

Issue 68462 CP 2501- Still being worked. May be ready for next JC per White.

Issue 68463 CP 504- Still being worked. May be ready for next JC per White.

Issue 68681 CP 05- Still being worked.

Issue 68069 CP 25- Still being worked.

Subcommittee 2

McCracken-Rania reported:

Issue 52425 CP 12 Brinkley motioned; Hoffman seconded.

Action: Approved pending QR review

Issue 64824 CP 13- Hoffman motioned; Brinkley seconded.

Action: Approved pending QR review

Issue 68460 CP 22A- This is ready but may not have been through the QR process yet. Jeans indicated this will have to be taken up next year.

Screening Report

Completed, reviewed all items on November 1, 2023. Will update Systemic Advocacy Management Systems (SAMS) after today's meeting. White encouraged members to join this exciting meeting. One issue was pulled and there may be two issues for next year.

Action Items

- Post the October minutes posting.
- Johnson will put dates on referral 68350 the elevate to the JC.
- Issues 66990, 52425 and 64824 elevated to JC.
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Chair Closing Comments & Roundtable

White encouraged members to come back to this committee to maintain the continuity and knowledge gained from this year's work. White encouraged members to read Annual Report.

Closing

Jeans thanked White for her leadership this year and called her work amazing considering how many new members were part of this year's committee. Jeans noted that taxpayers across the world will see the impact of this committee's work. Jeans encouraged returning members to be prepared to attend the face-to-face meeting starting next year and said more information will be sent via email about this. Jeans stated there could be an Ad Hoc meeting to work the inventory during the down time and Johnson will work with the committee on this project.

Jeans closed the committee for attending the meeting and closed the call at 3:37pm ET.

Next Meeting: TBD

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