

**Notices and Correspondence Committee (NCC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, March 12, 2024**

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Attendance**

- |                            |                  |                |
|----------------------------|------------------|----------------|
| • Cheryl Crowe             | Felton, DE       | Member         |
| • Manuel "Manny" Dominguez | Gladstone, MO    | Member         |
| • Mitchell Gerstein        | Wynnewood, PA    | Vice-Chair     |
| • Kyle Kipple              | Jacksonville, FL | Member         |
| • Robin Mosley             | Dayton, OH       | Member         |
| • Jill Ping                | Guide Rock, NE   | Member         |
| • Shelly McCracken-Rania   | Fountaintown, IN | Member         |
| • Steven Sklar             | New York, NY     | Chair          |
| • Michael Silva            | Charlotte, NC    | Member         |
| • Michael Stewart          | Kingsport, TN    | Member         |
| • Debra Kurita             | Visiting Member  | National Chair |

**Staff**

- |                          |                      |
|--------------------------|----------------------|
| • Kevin Brown            | Management Assistant |
| • Shawn Collins          | Acting TAP Director  |
| • Gulden Durdu           | TAP Program Analyst  |
| • Conchata Holloway      | TAP Program Analyst  |
| • Robert Rosalia         | TAP Program Analyst  |
| • Antoinette "Toni" Ross | TAP Program Analyst  |
| • Ann Tabat              | TAP Program Analyst  |

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

Cedric Jeans opened the call and welcomed everyone to the meeting.  
Collin s welcomed everyone and thanked them for joining TAP.  
Kurita welcomed everyone to the call and is looking forward to working with everyone throughout the new TAP year.

**Self-Introductions/Roll Call**

The TAP staff and TAP members introduced themselves and shared a self-introduction and gave a brief biography.

**Comments From the Public**

N/A

### **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. Jeans explained that the public is invited to attend our calls and may be on future calls.

TAP reviews notices and correspondence to ensure they are easily understood by taxpayers. This is where we fix issues raised by the public. Jeans reviewed all of the six TAP committees and explained what their purposes.

Jeans reviewed the charter since TAP is an agency sponsored organization and what we do to keep our charter active.

- Commit to volunteer time
- Identify grassroots issues
- Prepare annual report

### **TAS**

- Funding
- Support staff
- Designated Federal Officers (DFO)

### **TAP Success Stories**

- Longer one-time automatic extension of time to file taxes.
- Improvement recommendations to numerous tax forms and publications.
- Separate lessons for Affordable Care Act in Pubs 4012 & 4491, related to Volunteer Income Tax Assistance (VITA) and Taxpayer Counseling for the Elderly (TCE) Training.
- IRS Inform taxpayers currently in active Earned Income Tax Credit (EITC) audits of hours of availability and "live examiner" options.
- Recommended the callback feature to the toll-free lines.

### **Project Committees Responsibilities**

- Work issues assigned from TAS or the IRS
- Work with IRS program owners and Subject Matter Experts (SMEs)
- Screen new issues

### **Recommendations**

Decide whether to pursue an issue, transfer it to another committee, or drop it. Focus on customer service improvement.

Should be fully developed, clearly written and significant for the taxpaying public.

### **Support Staff**

- Appoint DFO for the project committees.
- Work with the panel and IRS to promote efficient project committees.
- 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 of referrals for structure and content
- Assist members in meetings.
- Consolidate outreach reports.
- Prepare travel documents/reimbursements.
- Help to develop TAP products such as Annual Report, Speak up Brochures, ImproveIRS.org and more.

Jeans indicated there would be more training in the in-person meeting in May of 2024.

Rosalia discussed the following:

### **TAP Meeting Procedures**

- 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.

Stay within the allowed meeting time.

Respect and be courteous to all members and staff.

Participate and take part in this process.

- 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 pre-reads before each meeting.

- Establish Quorum & Consensus

50 percent plus one person is a quorum.

Documents will be shared via MS TEAMS for documents

- Agenda & Pre-Read Information  
This will be sent via email and also posted on [www.tapspace.org](http://www.tapspace.org).
- Activity Reports/Time Reporting  
[www.tapspace.org](http://www.tapspace.org); [www.improveirs.org](http://www.improveirs.org);
- Methods of Communication  
Email, telephone, fax, and MS TEAMS

### **So you want to be a Chair**

Rosalia started a discussion about leadership. The committee discussed what makes a good leader. Rosalia explained what the Nations Chair and Vice-Chair do and what a project committee chair does. Chair runs the committee and is on the JC committee; the Vice-Chair helps lead the committee and is on the Outreach Committee; Subcommittee leads run each subcommittee and reports to the full committee.

Rosalia gave detailed examples of what the Chair and Vice-Chair duties and how important they are. Vice-Chair encourages members to complete the activity reports.

### Nominations and Election Process (Chair/Vice-Chair)

- Nominate Candidates

Steven Sklar self-nominated for Chair and went unopposed.

Mitchel Gerstein self-nominated for Vice-Chair and went unopposed.

- Self-Introduction/Bios

N/A

### **Voting**

- Election Results

Steven Sklar-Chair

Mitchel Gerstein- Vice-Chair

Sklar assumed control of the meeting.

### **Approval of Minutes:**

- November 9, 2023- Sklar motioned; McCracken-Rania seconded.

**Action:** Minutes approved as submitted.

### **Establishment of Subcommittees and Meeting Dates**

- Full Committee Project Meeting- Third Wednesday at 11am ET.
- Subcommittee 1- First Wednesdays 11am ET Sklar; Dominguez (**Lead**); Stewart; Kipple; Mosley.

- Subcommittee 2- First Wednesdays 1pm ET McCracken-Rania; Silva; Gerstein; Ping; Crowe (**Lead**).
- Outreach (Vice-Chair)- Gerstein
- Screening Members- Sklar, Stewart, Ping
- Quality (QR)- Kipple; Mosely
- Internal Communications (ICC)- Stewart, Kipple

Sklar, Dominguez, Jeans and Rosalia spoke about putting the hours on the activity reports and qualifying for the Presidential Awards.

### **2024 Project Committee Work**

Project **52362**: CP 14 Notice with a balance due. Assigned to Sub 1

Project **68462**: CP 2501 Initial contact notice - discrepancy between income. Sub 1

Project **68681**: CP 05 We're holding your refund. Assigned to Sub 2

### **2024 Project Committee Work from last TAP year**

Project **68463**: CP 504 Notice of Intent to Levy – (Review of SA/AA Feedback) - Assigned to Sub 1

Completed SA/AA/QR:

Project **68069**: CP 25 Notice of estimated credits discrepancy with balance due/overpayment- Assigned to Sub 2

Project **68460**: CP 22A Notice of Data Processing adjustment - Assigned to Sub 2

### **Next Steps/Action Items**

- Post the November minutes.
- Send pre-reads for Subcommittees

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

N/A

### **Closing**

Jeans indicated invites will be sent for recurring meetings. This will begin to gel and get easier over the next few months. Jeans thanked the committee for attending the meeting and closed the call at 1:00pm ET.

**Next Meeting: April 17, 2024 at 11am ET/10amCT**

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