

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, April 17, 2024**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|----------------------------|------------------|-----------------|
| • Cheryl Crowe | Felton, DE | Member (Absent) |
| • 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 (Absent) |
| • 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 |
| • Robert Rosalia | TAP Program Analyst |
| • Gulden Durdu | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Mejbeen Balsara | Program Analyst Wage & Investments (W&I) |

Welcome/Opening – DFO

Cedric Jeans opened the call and welcomed all who joined.

Roll Call

Quorum was made.

**Welcome/Announcements/Comments/Acknowledgement of Citizens/
Comments from the Public**

Steven Sklar thanked everyone for joining the call and welcomed everyone.

National Office Report/ DFO Report

Cedric Jeans spoke of looking forward to the face-to-face meeting and to contact Brown or Rosalia of any travel needs. Some Taxpayer Assistance Centers (TACs) are having Saturday opening, which would be an opportunity for

outreach. There are also Problem-Solving Days that could be outreach opportunities. They are on the Taxpayer Advocate Services (TAS) website. Jeans also suggested signing up for IRS subscriptions and for the National Taxpayer Advocate (NTA) blog. The TAP Recruitment period has closed, and interviews will happen in late May or early June. Jeans said we still need members for Vermont, North Dakota, and Wyoming, so please share this message if you know good candidates in these areas.

Committee News & Updates

Approval of Minutes:

- March 12, 2024- Sklar motioned; Gerstein seconded.

Action: Minutes approved as updated.

TAP Committee Update

Rosalia explained that this section will be to review IRS responses and some of the responses will be reviewed at the face-to-face meeting.

Awaiting Response:

Project **52425**: CP 12 Math Error notice with overpayment

Project **63395**: CP 2000 verification for unreported income

Project **68424**: CP 13 Math Error notice with overpayment

Project **66990**: Excessive Inserts/Stufflers

Project **53485**: Letter 2273C (Rebuttal sent 11/23) I/A Accepted

Project **57391**: Letter 1962C (Rebuttal) Direct Debit Inst Agreement

Project **63526**: IR-2022-170 (Rebuttal)

Subcommittee 1

Dominguez reported:

Project **68463**: CP 504 Notice of Intent to Levy

This issue is ready to be voted on. Sklar motioned; Dominguez seconded.

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

Project **52362**: CP 14 Notice with a balance due

This is being worked and will be reviewed at the face-to-face.

Project **68462**: CP 2501 Initial contact discrepancy between income

This is being worked and will be reviewed at the face-to-face.

Subcommittee 2

McCracken-Rania reported:

Project **68681**: CP 05 We're holding your refund.

This is still being worked.

Project **68069**: CP 25 Notice of estimated credits discrepancy with balance

This is ready to be voted on. McCracken-Rania motioned; Gerstein seconded.

Action: Approved to elevated to JC pending QR

Project **68460**: CP 22A Notice of Data Processing adjustment.
This is ready to be voted on. McCracken-Rania motioned; Sklar seconded.
Action: Approved to elevated to JC pending QR

2023 TAP Annual Report (Committee Check List)

Rosalia explained how the committee will assign each issue worked to a member to write a blurb about each issue and what the purpose of it was. This will be used to write the Annual Report section for this committee at the end of the year. Writing blurbs during the year will greatly reduce the time for this project.

Blurbs to be Assigned:

- Project **68463**: CP 504 Notice of Intent to Levy (**MD**)
- Project **68069**: CP 25 Notice of estimated credits discrepancy with balance (**SMR**)
- Project **68460**: CP 22A Notice of Data Processing adjustment. (**SMR**)

Screening Report: Date TBD

Issue **70106**: CP 23- Assigned to Subcommittee 1

Parking Lot:

Issue **68464**: CP 49- Assigned to Subcommittee 2

Outreach

Gerstein reported first meeting on Thursday, April 18, 2024, and he will have more to report after that. Gerstein reported being interviewed but an associated press business writer on tips for tax season. There will be a possible article in the near future. Rosalia explained how easy outreach is done, no matter how many people you talk to. Outreach is talking to anyone about TAP.

Internal Communications Committee (ICC)

Stewart reported the newsletter article being due by the 25 day each month to be published on the fifth day of each month. The committee spoke about the inclusion of TAP material in Voluntary Income Tax Assistance (VITA) document requests. They are looking for Facebook administrators. They also spoke about creating a listing of TAP meetings available for the public to sign up for instead of just depending on the federal register notices. Kipple spoke about redesigning the newsletter. Dominguez will send the blurb for this month by April 22, 2024.

Chair Closing Comments & Roundtable

Sklar thanked everyone who joined, and hope members can join all the upcoming meetings and is looking forward to the face-to-face meeting. The subcommittee meetings are tabled until the face-to-face meetings. Rosalia will help those who cannot attend in person to access the meeting virtually. Brown reminded the committee how the process works for travel and let the members know that he will be reaching out to the committee for the travel plans for the face-to-face meetings. Direct Deposit forms are needed for everyone also.

Closing

Jeans thanked everyone for joining and participating on the call and closed the meeting at 11:58am ET.

Next Meeting: May 7, 2024, at 3:00pm ET/2pm CT

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