

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday May 7, 2024**

Designated Federal Officer (DFO)

- Shawn Collins TAP Director

Attendance

- | | | |
|----------------------------|------------------|------------------|
| • Cheryl Crowe | Felton, DE | Member (virtual) |
| • Manuel “Manny” Dominguez | Gladstone, MO | Member (absent) |
| • Mitchell Gerstein | Wynnewood, PA | Vice Chair |
| • Kyle Kipple | Jacksonville, FL | Member |
| • Robin Mosley | Centerville, OH | Member (virtual) |
| • Jill Ping | Guide Rock, NE | Member (absent) |
| • Shelly McCracken-Rania | Fountaintown, IN | Member (virtual) |
| • Michael Silva | Charlotte, NC | Member |
| • Steven Sklar | New York, NY | Chair |
| • Michael Stewart | Kingsport, TN | Member |

Staff

- Robert Rosalia TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Rosalind Matherne TAP Program Analyst

Welcome/Opening – Designated Federal Official (DFO)

Shawn Collins opened the call and welcomed everyone to the meeting.

Roll Call

Rosalia completed roll and quorum was made.

Welcome/Acknowledgement of Citizens Comments from the Public

Sklar welcomed everyone to the meeting and reviewed the agenda. There were no comments from the public.

National Office/DFO Report

Collins thanked the committee for all their work and taking the time out of their schedule to attend face-to-face as well as those who are attending virtually. Collins also thanked those who volunteered for the tax forum, more information will be provided. Collins encouraged members to submit expenses for reimbursement for travel to Annie Gold or Kevin Brown.

Approval of Minutes:

- April 17, 2024, Tabled for the next full committee meeting.

TAP NCC Committee Update

Sklar informed the committee that Project 68463: CP 504 Notice of Intent to Levy was given back to the committee with some edits and will be sent back to the Joint Committee for approval to go to the IRS.

Rosalia reviewed projects and IRS responses along with projects awaiting responses from IRS. The following were discussed and are addressed in the Subcommittee section:

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/Stuffers
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 Report Out:

Sklar discussed projects from previously year:

- Project **53485**: Letter 2273C Mosley motioned to close project; McCracken-Rania-seconded.
- Project **57391**: Letter 1962C Mosley motioned to close project; McCracken-Rania-seconded.

Action: Approved to close both Projects as accepting IRS response

Subcommittee 1 is still working on the following projects:

- Project 52362: CP 14 Notice with a balance due
- Project 68462: CP 2501 Initial contact discrepancy between income
 - Project 70106: CP 23 - **Action: Project proposal approved.**

Subcommittee 2 Report Out:

Lead by Cheryl Crow. Subcommittee 2 is still working on the following issues:

Subcommittee 1 is still working on the following project:

- Project 68681: CP 05 We're Holding your Refund
 - Project 68464: CP 49 - **Action: Project proposal approved.**

The following issues were approved to be placed in the parking lot and assigned to Subcommittee 2 when appropriate:

- Issue 74034: CP 3219A
- Issue 71594: LT 38
- Issue 73865: CP 04

2023 TAP Annual Report (Committee Check List)

Rosalia and Sklar provided the following updates and assignments:

- Silva assigned to provide write up on project **68463**, SP 504 Notice of Intent to Levy.
- McCracken-Rania completed write for project **68069**: CP 25 Notice of est. credits with balance.
- McCracken-Rania completed project **68460**: CP 22A Notice of Data Processing adjustment.
- Mosely will work on write up for project **53485**; letter 2273C.
- McCracken-Rania will work on write up for project **57391**: Letter 1962C.

Screening Report Out:

Prior to the meeting both subcommittees had an open discussion regarding the screening report. Rosalia provided guidance around screening an issue and briefly explained the process. Rosalia stated the screening committee will not meet every month. They will meet as issues come in. Screening committee will determine what issues will be worked and shared as a courtesy with the full committee. The members completed and reviewed all items on previous screening report and voted to disposition as discussed in the screening meeting. Rosalia will update Systemic Advocacy Management Systems (SAMS) after today's meeting. Kipple encouraged members to join the next screening meeting. The following issues were placed in the parking lot:

- **Issue 74034**: CP 3219A
- **Issue 71594**: LT 38
- **Issue 73865**: CP 04 **Issue 69719**: Ltr 4883C Potential ID during Original Processing
- **Issue 71315**: Ltr 5447C Potential ID Processing Foreign Address
- **Issue 72770**: 5071C ID

Outreach Report

Gerstein welcomed input from the committee. Gerstein reminded everyone to complete the activity reports for all TAP related work no matter what it is. Gerstein gave examples of outreach that included his discussion with a Forbs reporter. Cheryl discussed getting an issue from the LTA. Rosalia reminded all members, anything and everything discussed with taxpayers about TAP is considered outreach.

Internal Communications Report:

Stewart and Kipple discussed the TAP Facebook social media presence. Stewart encouraged members to join FB and share content. Gerstein will provide an article on our 3-day face-to-face meeting for the Newsletter and potentially www.improveirs.org. Stewart reiterated the newsletter article is due the 25th of each month.

Chair Closing Comments & Roundtable:

The committee thanked Rosalia for this leadership and thanked the TAP staff for putting such a productive meeting together in a great location.

Closing

Collins thanked the Sklar for his leadership, and thanked the committee for their continuous work on the TAP including the members who were not able to attend face-to-face but dedicated time to attend via TEAMS. Collins expressed; many taxpayers are impacted by the work they do. Collins reminded members to update their activity records and meeting was adjourned.

Next Meeting: June 19, 2024, 11:00 am ET

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