

**Notices and Correspondence Committee (NCC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, July 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 (Absent) |
| • Robin Mosley             | Dayton, OH       | Member          |
| • Shelly McCracken-Rania   | Fountaintown, IN | Member          |
| • Steven Sklar             | New York, NY     | Chair (Absent)  |
| • Michael Silva            | Charlotte, NC    | Member (Absent) |
| • Michael Stewart          | Kingsport, TN    | Member          |

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | Management Assistant                     |
| • Shawn Collins          | TAP Director                             |
| • Conchata Holloway      | TAP Program Analyst                      |
| • Matthew O'Sullivan     | TAP Program Analyst                      |
| • Priscilla Medrano      | TAP Program Analyst                      |
| • Robert Rosalia         | TAP Program Analyst                      |
| • Antoinette "Toni" Ross | TAP Program Analyst                      |
| • Ann Tabat              | TAP Program Analyst                      |
| • Tamikio Bohler         | Program Analyst Wage & Investments (W&I) |

**Welcome/Opening – DFO**

Susan Jimerson, in light of Cedric Jeans having technical issues, opened the call and welcomed all who joined.

**Roll Call**

Quorum was made.

**National Office Report/ DFO Report**

Jimerson reported on the release of the National Taxpayer Advocate's mid-year report to Congress on June 26, 2024. Jimerson suggested members review this report and highlighted a few parts of it. Delays in resolving identity theft cases and the associated burden it causes to taxpayers experiencing this was one issue Jimerson discussed. Jimerson also spoke about how the IRS measures its level of service on the toll-free phone lines. Jimerson mentioned that we are

officially into the tax forum season with the Chicago, IL tax forum just ending and the Orlando, FL coming up soon.

There are four full committee meetings left after today's meeting, so Jimerson encouraged members to attend them so we can forward completed issues to the IRS for consideration.

The Outreach committee and the Internal Communications committee meetings are on July 18, 2024. The Joint Committee (JC) meeting will be on July 25, 2024. Jimerson encouraged members attending these meetings if they would like to.

Rosalia thanked those who joined the call for their participation and reminded them to let him know if you will not be joining future meetings, please.

### **Committee News & Updates**

#### **Approval of Minutes:**

- June 18, 2024

Gerstein motioned; Mosley seconded.

**Action: Minutes approved as submitted.**

### **TAP Committee Update**

Rosalia reported:

NCC News/Updates/Joint Committee meeting

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

This issue needs Quality Review (QR). Mosely will complete QR.

### **IRS Response Received**

Project **63526**: IR-2022-170 (Response to Rebuttal) – Sent it back to IRS for more clarity on some unaddressed questions.

### **Subcommittee 1**

Stewart reported:

Project **70106**: CP 23- This issue is still being worked.

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

Gerstein motioned; Stewart seconded. Mosley will do QR.

**Action: elevated to JC pending QR and TAS review process**

Stewart indicated that letters 6331C and 5747C should be added to the list to be reviewed also. In addition, Issue 73865 CP 04 was accepted by this subcommittee, per Stewart.

Issue **69719**: Ltr. 4883C, Ltr. 5447C, 5071C ID- Gerstein motioned project proposal; Dominguez seconded.

**Action: Project accepted to begin working**

## **Subcommittee 2**

Rosalia reported:

Project **68464**: CP 49- Tabled due to additional recommendations

Project **68681**: CP 05 We're holding your refund- This issue is still being worked.

Issue **74030**: CP 3219A **CC Lead**- Gerstein motioned project proposal;  
Mosley seconded.

**Action**: Project accepted to begin working

Issue **73865**: CP 04 **MG Lead**

Issue **71594**: LT 38 **SMR Lead**

## **2023 TAP Annual Report (Committee Check List)**

### **Blurbs to be Assigned:**

Rebut for the CP 12, 13 and CP22A (**SS**)

Project **68464**: CP 49

### **Blurbs Completed:**

- Project **68463**: CP 504 Notice of Intent to Levy (**MS-MD**)
- Project **68069**: CP 25 Notice of est. credits with balance (**SMR**)
- Project **68460**: CP 22A Notice of Data Processing adjustment. (**CC**)
- Project **52362**: CP 14 Notice with a balance due (**KK**)
- Project **53485**: Letter 2273C I/A Accepted (**RM**)
- Project **57391**: Letter 1962C Direct Debit Inst Agree (**SMR**)
- Project **68462**: CP 2501 Initial contact discrep. between income (**MS**)

### **Screening Report**

Issue 67718 CP01A was received from the Special Projects committee.

Assistance was requested from Rebecca Lammers for this issue. Subcommittee 2 will take this project. Bohler indicated the IRS is changing the way the Identity Protection PINs (IP PINs) are being sent out and will do a survey about how effective this method is. Gerstein motioned; Stewart seconded.

**Action**: Issue accepted for Subcommittee 2

### **Parking Lot:**

Rosalia reported a transcripts project that will be worked by the committee.

### **Outreach**

Gerstein reported Michelle Brookens sent emails out to encourage members to record their outreach activities on the activity reports. Equally as important are our outreach activities, per Gerstein. Gerstein suggested working with your Local Taxpayer Advocate (LTA) can be an effective way to do this. Systemic Advocacy is another option. Gerstein and Fred Smith can be consulted for outreach ideas if

necessary. Rosalia reminded members to complete their activity reports for all TAP activity in real time or at least a monthly basis. Jimerson suggested attending the Outreach meeting for ideas on how to log these activities. Jimerson suggested updating the report at least monthly to maintain accurate reports.

**Internal Communications Committee (ICC)**

Stewart asked for the newsletter report by July 23, 2024, from the committee. Please add a time sequence for the blurbs, especially for issues that spread across multiple TAP years. O'Sullivan suggested adding the blurbs in the Microsoft Publisher document to see if the report fits. O'Sullivan is available if assistance is needed.

**Chair Closing Comments & Roundtable**

Gerstein had no closing comments.

**Closing**

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

**Next Meeting: August 21, 2024, at 11:00am ET/12pm CT**

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