

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, August 21, 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 (Absent) |
| • Robin Mosley | Dayton, OH | Member |
| • Shelly McCracken-Rania | Fountaintown, IN | Member |
| • Steven Sklar | New York, NY | Chair |
| • 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 |
| • Christopher Duling | Attorney Advisor Systemic Advocacy (SA) |
| • Mejbeen Balsara | Program Analyst Taxpayer Services (TS) |
| • Tamikio Bohler | Program Analyst TS |

Welcome/Opening – DFO

Cedric Jeans opened the call and welcomed all who joined.

Roll Call

Quorum was made.

Committee News & Updates

Sklar welcomed everyone to the call.

- Approval of Minutes for July 17, 2024.

Sklar motioned; Stewart seconded.

Action: Minutes approved as submitted.

National Office Report/ DFO Report

Jeans spoke of the Joint Committee (JC) planning meeting next week in Jacksonville, FL. The staff is preparing for this meeting currently. Share any concerns or recommendations to Sklar and Gerstein for the up-and-coming tax year. Jeans indicated the next tax forum will be in Dallas, TX. Please join if you are in the area. There are a plethora of issues that can be picked up at these events. The last tax forum will be in San Diego where Debra Kurita, and Philip Hwang will be attending. Jeans suggested trying to get as many issues completed as possible since the TAP year will be ending soon. This will allow retiring members to see some of their work before they leave the TAP.

NCC News/Updates/Joint Committee meeting

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

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

Both of these issues were previously approved and have been edited so can be elevated to the IRS.

- Michael Silva

Jeans indicated it is too late in the year for an alternate.

- Search function on www.irs.gov

Michael Stewart spoke to the committee about this as a possible issue to make the search tool better. This issue is still being considered.

- Article for www.Improveirs.org.

IRS Response Received

Project **63526**: IR-2022-170 (Response to Rebuttal) – Sent it back to IRS for more clarity on some unaddressed questions on July 24, 2024. Still awaiting response.

Subcommittee 1

Stewart reported:

Project **70106**: CP 23- This issue seeks to improve the form and makes several recommendations like to add a Quick Response code and more information to make this form more helpful to taxpayers. Gerstein spoke of being consistent with what the IRS has already approved but suggested a standard template to ensure the consistent accuracy for each letter that we recommend corrections to. Stewart motioned; Sklar seconded.

Action: elevated to JC pending Quality Review (QR) and TAS review process

Mosely and Stewart will do the QR.

Project **69719**: Ltr 4883C, Ltr 5447C, 5071C, 6331C, 5747C ID **Still in**

progress.

Issue **73865**: CP 04 **Still in progress.**

This issue is still being worked.

Subcommittee 2

Crowe reported:

Project **68464**: CP 49 Crowe motioned; McCracken-Rania seconded.

Action: elevated to JC pending QR and TAS review process

Project **68681**: CP 05 We're holding your refund. **Tabled for next month**

Project **67718**- CP01A IP Pin (Proposal from Special Projects)

This issue is still being worked.

Issue **71594**: LT 38 **Still in progress.**

Project **74030**: CP 3219A **Tabled to next month.**

2023 TAP Annual Report (Committee Check List)

Rosalia will work with members to write blurbs from issues that carried over from last year.

Blurbs to be Assigned:

Project **68464**: CP 49(CC)

Project **70106** CP 23 (MS)

Project **52425**: **CP 12 Math Error notice with overpayment (Rebut)** Assigned to Sklar

Project **68424**: **CP 13 Math Error notice with overpayment (Rebut)** Assigned to Sklar

Project **68460**: **CP 22A Notice of Processing adjustment (Rebut)** Assigned to Crowe

Screening Report

Rosalia indicted the committee is working several projects now and the chair agreed that they may assign additional work in the future.

Outreach

Gerstein reported getting a shouted out by Brookens regarding Nitty Gritty on taxes outreach event. Continue to enter your time on www.tapspace.org timely. Gerstein reminded the committee to always select this committee all the time, so credit is given to us for our work.

The total outreach hours are behind the average and unreported hours will need to be added. Gerstein asked for more research for outreach events in each state. Stewart provides some outreach suggestions. Gerstein reported nearing end of year and will need members to add their hours to the activity report. The National

Taxpayer Advocate (NTA) attended the Baltimore tax forum. This event has led to other outreach events for Gerstein.

Internal Communications Committee (ICC)

Stewart reported Facebook administrator remains a request for the committee. Let Stewart, Kipple or Rosalia know if you want to be one. They are working on a citizen email list with part of gov delivery. Get newsletter by tomorrow night so it can be submitted by Friday.

Chair Closing Comments & Roundtable

Sklar thanked everyone for joining the meeting.

Closing

Jeans thanked everyone for joining and participating in the Online Services focus group. Jeans closed the meeting at 11:58am ET.

Next Meeting: September 18, 2024, at 12pm ET/11am CT

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