

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, June 18, 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 (Absent) |
| • Shelly McCracken-Rania | Fountaintown, IN | Member (Absent) |
| • Steven Sklar | New York, NY | Chair |
| • 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 |
| • Priscilla Medrano | TAP Program Analyst |
| • Matthew O'Sullivan | 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) |
| • Lisa Hunter | Legal Admin. Specialist Systemic Advocacy (SA) |

Welcome/Opening – DFO

Cedric Jeans opened the call and welcomed all who joined.

Roll Call

Quorum was made.

Welcome/Acknowledgement of Citizens/Comments from the Public

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

National Office Report/ DFO Report

Collins thanked the members for all the work they do as volunteers. Reminded the committee that tax forums will be starting next month, and we are looking forward to feedback so we can continue to improve our participation in these

events. Collins reported the planning of the Joint Committee (JC) face-to-face meeting for August 26-29, 2024, in Jacksonville, FL with Annie Gold doing the travel plans.

Please reach out to Annie Gold or Kevin Brown if you have not received your travel reimbursement yet. The business cards should have received by now, let your analyst know if you have not received your cards yet. The TAP quarterly meeting will be July 10, 2024, at 1:00pm ET. Collins shared the perspective speakers and allowing for presentations and a question-and-answer portion.

Collins reminded the committee to include ALL TAP time on your activity reports.

DFO Report

Jeans reported Jill Ping resigning. Jeans also indicated that there are extra annual reports, so members can ask Rosalia if they would like any extra copies.

Committee News & Updates

Approval of Minutes:

- April 17, 2024
- May 7, 2024

Sklar motioned; Crowe seconded.

Action: Minutes approved as submitted.

TAP Committee Update

Sklar indicated we sent two issues to JC and may have several more soon.

IRS Response Received

Project **68460**: CP 22A Notice of Data Processing adjustment. Sklar assigned this issue to Subcommittee 2 for review. Crowe will write a blurb on the success of the referral. Gerstein suggested changing the language for a possible rebuttal.

Awaiting Response:

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

Project **66990**: Excessive Inserts/Stuffers

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

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

Project **68069**: CP 25 Notice of est. credits with balance

Subcommittee 1

Dominguez deferred to Gerstein to report.

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

Stewart motioned; Sklar seconded.

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

Project **68462**: CP 2501 Initial contact discrepancy between income Stewart motioned; Sklar seconded

Action: elevated to JC pending QR and TAS review process

Project **52425**: CP 12 Math Error notice with overpayment (Rebut)
Being worked

Project **68424**: CP 13 Math Error notice with overpayment (Rebut)
Being worked

Project **70106**: CP 23
Being worked

Issue **69719**: Ltr 4883C, Ltr 5447C, 5071C ID
Being worked

Subcommittee 2

McCracken-Rania reported:

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

Project **68464**: CP 49. **Being worked**

Issue **74034**: CP 3219A (CC) **Being worked**

Issue **71594**: LT 38 (SMR) **Being worked**

Issue **73865**: CP 04 (MG) **Being worked**

Outreach

Gerstein reminded the committee to complete their activity reports on www.tapspace.org. Gerstein attended a joint working conference with the IRS and Pennsylvania that he presented at. Gerstein was able to speak and met with the Local Taxpayer Advocate (LTA) and will do future outreach with them. Kipple attended an American Payroll Association (APA) associate meeting for outreach. The last meeting included IRS employees and was able to communicate with them. Stewart stopped by his local congress representative's office for outreach. Jeans is delighted to see the outreach and directed the committee to the outreach repository.

Internal Communications Committee (ICC)

Kipple reported they are looking for additional Facebook administrators. They would like to move into LinkedIn. Stewart indicated LinkedIn had a lot of problems, but they are still working on this project. The committee is still discussing a standing sign-up list for access to our committee meetings by the public with a link to attend. The Newsletter deadline June 25, 2024. O'Sullivan thanked everyone for the deadline reminder.

Chair Closing Comments & Roundtable

Sklar thanked everyone for chipping in and hopes we are helping the IRS become a better organization.

Closing

Jeans thanked everyone for joining and participating on the call and closed the meeting at 11:54m ET.

Next Meeting: July 17, 2024, at 3:00pm ET/2pm CT

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