

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, September 18, 2024**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|----------------------------|------------------|-----------------|
| • Cheryl Crowe | Felton, DE | Member |
| • Manuel "Manny" Dominguez | Gladstone, MO | Member (Absent) |
| • Mitchell Gerstein | Wynnewood, PA | Vice-Chair |
| • Kyle Kipple | Jacksonville, FL | Member |
| • Robin Mosley | Dayton, OH | Member |
| • Shelly McCracken-Rania | Fountaintown, IN | Member (Absent) |
| • Steven Sklar | New York, NY | Chair |
| • Michael Stewart | Kingsport, TN | Member |

Staff

- | | |
|--------------------------|---|
| • Kevin Brown | Management Assistant |
| • 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 |
| • John Manhire | Attorney Advisor Systemic Advocacy (SA) |
| • Mejbeen Balsara | Program Analyst Taxpayer Services (TS) |

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

Sklar welcomed everyone to the meeting.

National Office Report/ DFO Report

Jeans reported that the Annual Report committee team is being put together. A solicitation for members to join this committee will be sent by Holloway. Please respond by September 20, 2024.

Chair elections are being planned for next TAP year. More information on this should be out within the next week. The tax forums concluded, and Rosalia thanked everyone who participated at the events. The Joint Committee (JC) planning session recently concluded. At the meeting the committees discussed projects for next year, and the bylaws were discussed for potential updating. The Director and the members that contributed are still deliberating the updates. Jeans mentioned the potential outreach opportunity with SPEC and that they are embarking on an initiative to address Scam Prevention.

Committee News & Updates

With NCC losing some members the committee voted to combine subcommittees. They agreed to make the time slot - First Wednesday, at 11:00am to 12:00pm ET with the option to extend the meeting 30 more minutes if needed. They will proceed to meet every first Thursday of the month for the rest of the year. Gerstein requested leaders remain as coleaders of this new group. Sklar motioned; Mosely seconded.

Action: Subcommittees to merge at the new time by unanimous consent.

Approval of Minutes:

August 21, 2024, Meeting Minutes. Sklar motioned; Mosely seconded.

Action: Minutes approved as submitted by unanimous consent.

TAP Committee Update Continued/Outreach

NCC News/Updates/Joint Committee meeting

Gerstein announced that Manuel Dominguez was appointed to Electronic Tax Administration Advisory Committee (ETAAC) as a new member. Gerstein thanked Brown for completing the travel voucher process.

The amendments to the bylaws are being considered by the Director and will be responded to before the end of the TAP year. Gerstein reported that end of year strategies were talked about to push as many referrals out as possible. Member engagement to ensure members stay engaged through mentoring and continued outreach. The survey results and changes to using vender product to enhance the future survey going out, mid-year maybe.

Sklar indicated that the bylaws committee will be meeting again on this coming Monday.

Gerstein reported that the staff is revamping the activity record system to simplify how it looks and to make it easier to get your time in. The form is now accessible on your mobile phone. Gerstein recommended that members volunteer for next year's tax forums, which was a great experience. Michelle Brookens mentioned

lots of success working with Stakeholder Partnerships, Education & Communication (SPEC) for outreach opportunities.

IRS Response Received

Project **63526**: IR-2022-170 (Response to Rebuttal) **Under consideration now.** Kipple requested getting Notice 1450 for review since the IRS referenced to it in the response. Balsara will find out if this was a typographic error and follow-up.

Project **52425**: CP 12 Math Error notice with overpayment (Rebut) Sent back to IRS 9/2024- Holloway will share response with Rosalia for review.

Project **68424**: CP 13 Math Error notice with overpayment (Rebut) Sent back to IRS 9/2024- Holloway will share response with Rosalia for review.

Project **63395**: CP 2000 verification for unreported income
To be reviewed by the subcommittee.

Project **68069**: CP 25 Notice of est. credits with balance
To be reviewed by the subcommittee.

Subcommittee 1

Stewart reported:

Project **69719**: Letter 4883C, Letter 5447C, 5071C, 6331C, 5747C ID **MD Lead**
Revised form needs to be reviewed again and should be completed by next meeting.

Issue **73865**: CP 04 Military Dates of Service **MS Lead**

Project is in the final state to be approved with expectation to be voted on next month. Project proposal approved Crowe motioned; Gerstein seconded.

Subcommittee 2

Crowe reported:

Project **68681**: CP 05 We're holding your refund. **Project completed** Crowe motioned; Gerstein seconded.

Action: Issue elevated to JC pending Quality Review (QR)/SA/AA review

Project **67718**- CP01A IP Pin (Proposal from SP)- Committee agreed to use some of the recommendations for QR coeds etc. before closing the project.

Project **74030**: CP 3219A Notice of Deficiency **Project completed.**

Crowe motioned; Gerstein seconded.

Action: Elevated to JC pending QR/SA/AA

Issue **71594**: LT38 Reminder, Notice Resumption – Project proposal approved
Crowe motioned; Gerstein seconded.

Internal Communications Committee (ICC)

Stewart reported still working on a citizen email list with part of gov delivery. Kipple reported meeting scheduled by O’Sullivan for members who want to work as administrators on the Facebook page this week.

Chair Closing Comments & Roundtable

Sklar thanked everyone for joining the meeting and mentioned there are only two more meetings left for this year, so we need to continue to document everything we do to have a complete and robust Annual Report this year. Gerstein reminded everyone to please enter your time on activity report.

Closing

Jeans thanked everyone for joining and participating in the Online Services focus group. Jeans closed the meeting at 11:59am ET.

Next Meeting: October 16, 2024, at 11am ET/10pm CT

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