



Designated Federal Officer (DFO)

- ## Attendance

- ## Staff

- ## IRS Staff

- ## Public

Welcome/Opening – DFO

1

Roll Call

Quorum was made.

National Office & DFO Report

Rosalia reported they should be receiving 2024 Annual Report in Mail. Local Outreach travel is suspended but we can offer Virtual Outreach Assistance via MS Teams as long as its within our normal business hours. Tax Forum attendance is suspended as well, but if any members are planning to go on their own, please be sure to share edited Speak up Brochures. Contact Rosalia for outreach assistance and encouraged members to ask for outreach materials if they need any.

Committee News & Updates

Approval of Minutes

November 12, 2024, Meeting Minutes

February 19, 2025, Meeting Minutes

March 12, 2025, Meeting Minutes

Sklar motioned; Porcaro seconded

Action: All minutes unanimously approved as edited

Update on TCS Notice Redesign efforts

Doralisa Saldana, Director of Advocacy Implementation and Evaluation identified herself and introduced the other guests of the meeting and what their specialties were. They work together to help improve the taxpayer experience with TAS.

Tina Dix, Chief, Taxpayer Correspondence Services (TCS)

Robert Felty, Acting Director of Distribution in Media and Publications

Maria Cheeks, Director of Distribution in Media and Publications

The purpose of this presentation is so that TAP is working on current issues within the TAS offices that work on notices and correspondence, per Dix. Tina Dix provided a history of the goals of the TCS. The IRS sends approximately 300 million notices to taxpayers each year. TAS focuses on notices, corresponded letters, and repository letters. TAS focuses more on forms going out to individuals. We do this because it benefits all taxpayers and allows TAS to help more people with tax education, sending clear and concise message, reducing questions, combating scams and freeing up employees to work on much more complex issues. We are trying to simplify documents while protecting Personally Identifiable Information (PII).

Dix indicated this was a cross-functional enterprise-wide effort for internal and external stakeholders with over 40 other agencies to help get the best product for

taxpayers. This effort is open to continued feedback for more improvements. We developed Spanish versions of many documents. We are redesigning old form to make them look like current notices. We are ensuring they are on a level easily understood by the public, plus we want clear next steps to know what plans are moving forward for any other changes. In one year, we did over 200 notices with this effort. We streamlined the development process for revising or creating new notices. We developed new redesign standards, Dix continued.

Dix gave examples of some of the forms that were shorted for taxpayers to quickly understand what the notice received said. We redesigned 283 notices for 2024 and will be making additional changes as IT and funding allows us to. We continue to encourage taxpayers to use the online accounts. Dix continued that we have over 100 more notices to redesign so far and will be working on about 200 business notices.

Sklar indicated that this committee has many of the same ideas and would like to work with them for improving the products. The committee asked several questions about specific notices and forms and Dix gave a status on them for the committee. Specifically, the annual Identity Protection PIN (IP PIN). Dix said the notice has been available since 2020. The committee will send any other questions via email per Rosalia. Sklar hopes the redesign effort will help partner TAP with their unit moving forward.

IRS Response Received

Project 68462: CP 2501 Initial contact discrepancy between income
Tabled for Subcommittee 1 to review

Subcommittee 1- Stewart

Project 74553: CP 30 Est. Tax Penalty Notice (Bal-Due)

Still being worked, expected to be done in May.

Project 75134: CP 59- First Notice Unfiled Return Delinq –

In process of looking at the review by SA and AA and adjusting the referral.

Subcommittee 2- Porcaro

- **Project 66432:** CP 565 (ITIN)

Adding a PDF to one of the recommendations and some additional language to the boiler plate recommendations.

- **Project 76527:** CP 312 & CP 313 POA Online Termination

In the process of completing some additional recommendations to address being unaware of the termination.

Outreach – Kipple

- Keep Activity Reports up to date

- First Screening Committee meeting scheduled for March 20, 2025

Kipple record your time on www.tapspace.org.

Internal Communications Committee

Review of ICC Updates

Newsletter- Sandy Johnson will complete this month's report

Chair Closing Comments & Round Table

Thanked everyone for attending the meeting.

Closing

Rosalia closed the meeting at 12:00pm ET.

Next Meeting: May 14, 2025, at 11am EST/10am CST/ 9am MST/ 8am PST

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