TAP – One Voice for Change

"Citizen Volunteers Valued for Improving IRS Services"

2025 Notices & Correspondence Project Committee
Wednesday, August 13th, 2025
11:00 am ET, 10:00 pm CT, 9:00 am MT, 8:00 am PT, 6:00 am HI
Call-in information: (737) 253-8186 Meeting ID: 703 383 732#
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Topic	Leader
Welcome/Opening	Robert Rosalia, Program Analyst, opened meeting
Roll Call - Including Citizens from the Public	Robert Rosalia conducted roll call. TAP member attendees: Mitchell Gerstein, Sandra Johnson, Kyle Kipple, Steven Sklar, Michael Stewart TAP member absent: Talibah Bayles, Howard Choder, Manuel Dominguez, Joseph Holley, Gregory Porcaro IRS attendees: Doralisa Saldana (TAS), Tina Dix (TCS) Public attendees: None
National Office Report	Saul Hernandez, Acting TAP Director, shared updates to the Local Taxpayer Advocate (LTA) Listing, noting the Houston and Mississippi changes. Informed them the Pub 4134 lists all Low-Income tax clinic's (LITC) locations, and it can be useful in networking. It shares the names and contact information of the clinics across the US and PR. Also found here - Low Income Taxpayer Clinics (LITC) - Taxpayer Advocate Service Saul talked about his findings when talking to Chief Counsel and since the only TAP committee that makes recommendations to the IRS is the Joint Committee. The JC is the only committee that must follow FACA requirements. This means that instead of operating by quorum we can use a consensus vote. However, we are still posting all committee (including project) on our improveIRS site - Committee Meetings - Taxpayer Advocacy Panel

Welcome - Committee News & Updates	Steve Sklar, NCC Chair, welcomed the members and thanked the guest IRS employees for attending. Discussed the Joint Committee Planning session and the future state of TAP. Requested members of NCC send him and Rob any ideas or changes they would like to see with the TAP in the future. The speak up brochure was sent to everyone in PDF form so they can view or print a copy if needed. Mitch stated that like the TAS Roadmap the brochure can be ordered, he will send out a link. Steve mentioned that we received e-mails for TAP participation in discussions with Systemic Advocacy on the MSP topics and if anyone on the committee wanted to join to send Rob an e-mail, if they haven't already done so. We are making preparation to start preparing the TAP Annual Report and most of the committee are change their approach and mirroring our process of writing to the projects as they are completed. We will continue to do this and add the "Blurbs" to the newsletter **IRS Response for disposition:** Project **52362**: CP 14 Notice with a balance due - 2024 Kyle Kipple: stated that essentially all the recommendations are "under consideration" due to the redesign set to take place mid 2026 Rosalia stated that in these situations, the committee options are to rebut the recommendation, but with all "under consideration" doesn't seem viable. The other option is to accept the IRS responses but put the closing status in "Monitor IRS Actions" so we can follow-up on the recommendations. Steve agreed that there is nothing to rebut but thought that since the TCS redesign team was with us it would be good example of how NCC can be utilized o work better together with TCS and the redesign team on the projects. Kyle agreed that we should differ officially motioning until the end of the day's discussion. Saul suggested that we table the project and have our guest present.

TCS Notice Redesign efforts	Doralisa Saldana, Acting Exam Technical Director Tina Dix, Chief, Taxpayer Correspondence Services (TCS) Doralisa introduced herself and Tina Dix -Mission is to develop way to streamline and enhance internal process to enhance the taxpayer experience. Tina Dix -Service sends 300 million pieces of correspondences on average per year -Last year and half they have been part of the "Simple Notice Initiative" redesigning correspondences. Started with individual TP with focus on understandability. They asked themselves if the TP would know why they received the notice and came to find that they didn't. - They get feedback from LITC/TAP/TP and all forward-facing areas of the IRS make updates and review data to see the impact and rework the notice continually. -150 business notices but are not in production yet and must be discussed with other stakeholders -Schedule is based on IT resources and prioritizing volume -Starting to branch out to business and tax professional - Looking to reduce the number of notice that do/say the same thing and have rendered 900 notices obsolete -They redesigned 200 notices and digitalized them for online accounts -Option for e-mail of digital notification of new notices - expanding online service to house notice many since 2000 are available Mitch discussed the template of recommendations, and it was said that there is a MOU with the TAS language but nothing standard for online accounts. Many letter's and Notices either are tailored to the TP situation or the online service can't accommodate the request of listed in the letter or Notices. Steve asked if NCC can work as one of their stakeholders. Tina agreed and informed the committee that she would like them to work with them in real time but is not sure what that would look like with the different time frames and logistics that go into the redesign. Saul asked if there is a pipeline of the workflow of what's next and what's currently under revision for review that can be shared with a turnaround time on the project. Rob pointed out that if we were able to access a pipeline list, it would allow NCC to match their grassroot issues to the pipeline priority and potentially reduce overlap. He asked if while we worked out a plan of action to collaborate on our efforts, he could send a list of the notices that the committee is currently working on to see where they are in the process and if we have the latest and greatest. Doralisa concurred and Mitch expressed his appreciation to the redesign team. -The Redesign team will meet with TAP Staff to look at different option on collaborating, Rob will send Tina and Doralisa a listing of what NCC is working on and check in on new grassroot issues as they up. Mitch discussed his visit to this year's tax forum and the initiative for online accounts and asked if they can be point to materials on the subject. Tina said she knew some of the people involved with the initiative and will share their contact info

	with Saul and Rob, if you want to have a discussion with them. Mike suggested sending out a letter to inform TP about the available service.
	Wednesday, July 9th, 2025 – **NCC Meeting Minutes** Approved Sklar motioned; Mitch seconded.
	All other topics tabled until next meeting - September 10th, 2025

Subcommittee 1:
Project **74553:** CP 30 Est. Tax Penalty Notice (Bal-Due)
Project **78412:** CP44, CP05 and Associated Processing Issues
Project **68462:** CP 2501 Initial contact discrepancy (Review IRS Responses)

Issue **77769:** 14C (Add F843 info - CP03 CP03A and CP03B) **52362**

Sandra Johnson
On behalf of:
Michael Stewart
 Lead

. Outreach meeting update. We now have a new individual outreach plan template designed to guide and support our advocacy efforts. Resource to help structure the individual outreach activities and encourage engagement more broadly beyond work already happening in our committees.

Members should be spending between 200 and 300 hours per year whether that's TAP dancing at community events, volunteering at Volunteer Income Tax Assistance (VITA) or Low Income Tax Clinics (LITC) sites. Posting on social media or simply spreading the word about TAP's mission to improve the IRS as part of that initiative. Encouraged contact with the LTAs and Stakeholder Partnerships Education & Communication (SPEC) partners. Continue to direct people to the improve irs.org site and continue to highlight TAP through use of the member's business cards. Add the new digital version of the TAP Speak Up brochure for download. Shared link previously with members. Highlighted the TAS Roadmap brochure, which is a useful visual illustration of the complexity of our federal tax system. This helps members understand where TAP fits into the larger picture. Printed versions can be ordered online, too.
Michelle Brookens, TAP 2025 National Chair, asked for comments. No comments. Asked for motion to accept minutes as they stand. Tony Earwood made a motion and seconded by Jim Simpson. No objections. Passed.

Subcommittee 2:
Project **78261**: CP 590 Prepared Inaccurate Return
Project **78897:** CP210, CP220 & ERC related Correspondences (105C)

SA Feedback Received (With AA)
Project **76527**: CP 312 & CP 313 POA Online Termination –
Deliberating SA Comments
Project **66432**: CP 565 (ITIN) – **SA no comments**

Kyle Kipple
On behalf of:
Greg Porcaro
Lead

Outreach:
Review of Outreach Updates/Highlights
Activity Report - /TAPSpace
Kyle Kipple
Vice Chair

ICC:
Review of ICC Updates
Newsletter – Talibah –
August 20th

Sandy Johnson & Talibah Bayles

NCC Project List	Project Status Checklist
Awaiting IRS Response: Project **66990:** Excessive Inserts/Stuffers 2023 Project **68460:** CP 22A Notice of Data Processing adjustment (Rebut) 11-24 Project **68681:** CP 05 We're holding your refund -2024 **Awaiting IRS Response 2025:** Project **73865:** CP 04 Military Dates of Service & LTR 15109 4-25 Project **71594:** LT38 Reminder, Notice Resumption 4-25 Project **69719**: Ltr 5071C & other related docs 5-25 Project **75134:** CP 59 -1st Notice Unfiled Return Delinquent 6-25 **IRS Non-Response Received – Elevated:** Project **68463:** CP 504 Notice of Intent to Levy 5-25 Project **74030:** CP 3219A Notice of Deficiency Project **70106:** CP 23 9/24 Project **68464:** CP 49 Overpayment Adjustment 9/24 Project **67718**- CP 01A IP PIN	

- ✓ Participate fully
- ✓ Listen and respect each other
- ✓ Be specific
- ✓ Share and don't dominate
- ✓ Respect people and attack problems

- ✓ OK with disagreements
- ✓ Solid teamwork
- ✓ Avoid sidebar conversations
- ✓ Speak one at a time

- ✓ Stay with time schedule
- ✓ Mute when not talking *6
- ✓ Agreement with no regurgitation
- ✓ Have fun