



### Designated Federal Officer (DFO)

- ## Attendance

- ## Staff

- ## IRS Staff

- ## Welcome/Opening – DFO

Lipold opened the call and welcomed all who joined.

## Roll Call

Eight members in attendance meeting quorum.

## National Office Report

1

The National Taxpayer Advocate has released the Objectives Report to Congress which can be accessed through the [improveirs.org](https://improveirs.org) site or from [irs.gov](https://irs.gov). If the members would like a hard copy, please send your name and preferred mailing address to your committee analyst.

Hernandez also mentioned TAP had a conversation with the Volunteer Income Tax Assistance (VITA) supervisor. Our plan is to work together in the future on improving their products and strengthen the relationship with TAP. We know many of the TAP members are currently involved with the VITA program.

Smith, Jr. reported TAP will be holding virtual JC Planning meetings which will take place on August 12th and August 19th for two and half hours. The meeting is usually held in person, but due to budget constraints will be held virtually. The meeting is open to each committee chair and vice chairs to plan next year's goals. TAP is asking members to bring to the table things that need work within TAP, to make improvements on processes and products. Any members can make suggestions and should submit to the committee chair and vice chair.

### **Welcome - Committee News & Updates**

Sklar welcomed everyone and informed the committee of the National Tax Forums. TAP members can attend but we do not have an official presence at the Forums and cannot distribute materials on behalf of the Program. Sklar discussed the IRM sent as a pre-read and the guidance received on the amount of QR codes that can be in an IRS correspondence. While there is no restriction the best practice is to keep the amount limited to two or three. The Standard Language for Taxpayer Advocate Service in Correspondences have been checked and two variations were added to the boiler plate recommendation list.

### **Approval of Minutes**

June 11th, 2025, Meeting Minutes

Sklar motioned; Kipple seconded.

**Action:** Minutes unanimously approved as written

### **Update Referral Status:**

Rosalia indicated that there were no updates to the status of the outstanding project responses. Management and the Joint Committee analysts was informed are working on securing the overdue responses.

### **Subcommittee 1 – Stewart**

#### **Issue 78412: CP44, and CP05**

Stewart discussed the delayed responses from the IRS and expressed concerns on making a motion to accept this issue as a project. Noting the CP44 is a short notice and with the slow response time that TAP is receiving they may want to consider putting their effort into something else. Stewart asked for a reminder of the project basis. Rosalia brought up the discussion with the screening team and that the CP44 was just one of the notices they found that reflected the taxpayer's

issue, but it can tie into a Most Serious Problem (MSP) found in the National Taxpayer Advocate's Report to Congress (ARC) on processing issues. Stewart referred to the rest of the subcommittee for thoughts on the project. Johnson informed the subcommittee that she discussed this project with her constituents and communication in processing returns is a big problem. Sklar added communication from the IRS to the taxpayer through a notice and/or some correspondence is how we would want to approach the project, and it is not limited to the CP44. Stewart informed the subcommittee that he had a better understanding of the project and asked Johnson if she would make the motion to work the issue into a project.

Johnson motioned; Sklar seconded

**Action:** Project Proposal Approved - Issue to be worked into a project, the title was updated: **78412: CP44, CP05 and Associated Processing Issues**

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

Stewart said the project is still in the final phases. He mentioned a recommendation that he felt was important and inquired about how they can move just a few individual recommendations up to the IRS. Rosalia informed the committee that the referral can be broken up if needed to expedite recommendations, but since the recommendations are not ready for approval right now, it was suggested to be discussed at the next subcommittee and if needed, presented to the committee when they are ready for approval. Stewart agreed to and the tabled the project until the next subcommittee meeting.

**Project 68462: CP 2501 Initial contact discrepancy (Review IRS Responses)**

Stewart informed the committee that they have not received the updated notice referenced in the responses. The subcommittee has not been able to take any action without it and they will have to review the responses again once they receive the notice.

**Issue 77769: CP14 (Add F843 info - CP03 CP03A and CP03B)**

The Subcommittee did not get a chance to discuss it at the last meeting so the Issue is still being reviewed to determine if it would warrant a new project or to be dropped.

**Subcommittee 2- Porcaro**

**Project 78261: CP 590 Preparer Notification of Possible Return Preparation**

**Errors** – The committee has collected recommendations to the notice, but they did not get a chance to discuss it at the last meeting as they had a subject matter expert (SME) as a presenter at their meeting and gave the floor to the SME discussed

**Issue 78897: CP210 & CP220** – Porcaro mentioned that Employee Retention Credit (ERC) notices and letters do not provide sufficient information to evaluate if the balance due on the notice is correct or if the basis for the rejection of claim

is accurate. There is a very limited time to appeal and according to the IRS as of 10/26/2024 there were still over a million unprocessed claims. The Subcommittee had a SME discuss the problem they were seeing as listed in the MSP in the ARC. She gave an excellent presentation about the various issues that have hindered the IRS's ability to process ERC claims efficiently. She also shared a detailed report that was provided in the pre-reads. One of the reports also highlighted the lack of critical information provided in IRS ERC Notices and Letters. Porcaro requested a motion to approve the issue as a project

**Action:** Issue unanimously approved as a project.

**Action:** Project Proposal Approved - Issue to be worked into a project, and the title was updated: **Project 78897: CP210 & CP220 and ERC related**

### **Correspondences**

The following two projects are waiting for feedback from Systemic Advocacy (SA) and the Attorney Advisors (AA).

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

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

### **Outreach**

Kipple encouraged everyone update their time in TAPSpace and advised that he and the TAP staff could help them if they had any issue inputting it into the system. Johnson reported working with her Local Taxpayer Advocate and mentioned that she invited him to an event. She has a podcast coming up in the future that can be a great source of exposure, and she continues to utilize social media to conduct outreach.

### **Internal Communications Committee (ICC)**

Johnson mentioned that the ICC and outreach has merged, and the ICC is at this time only taking on the newsletter, adding that the last one was posted recently to TAPSpace.

Bayles will author the June Newsletter article for NCC and have it completed by July 20<sup>th</sup>

Johnson and Porcaro will send a writeup for their subcommittees

### **Screening Report**

Stewart discussed the screening report they made disposition. Two issues were being stored in the parking lot as they are not yet ready to be worked. The following two issues were identified and added to the respective committees for project starts:

**78897**: ERC CP220 (Sub 2)

**78412**: CP44 and CP05 (Sub 1)

### **Parking Lot:**

**78417**: LTR 0143C

**78353**: CP99A buyer elected to trans EV Credit

**Welcome/Acknowledgement of Citizens Comments from the Public**

No members of the public present

**Chair Closing Comments & Round Table**

Stewart mentioned that the TAS is offering a hardcopy of the roadmap on their site.

**Closing**

Lipold closed the meeting at 11:56 am ET.

**Next Meeting: August 13<sup>th</sup>, 2025  
11am EST/10am CST/ 9am MST/ 8am PST**