



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 8, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Members Present

- Paul Berlage Cincinnati, OH Member
- Shani Bowser Harrisburg, PA Member
- Tracy Bunner Farr West, UT Chair
- Felecia Dixson Rolla, MO Vice Chair
- Michael Shamgochian Petersham, MA Member
- Kimberly Shepherd Monroe, LA Member

Members Absent

- Ronald Fitzherbert Las Cruces, NM Member
- Bradford Folta Jr. Gardiner, ME Member
- Charles Jones Green Cove Springs, FL Member
- Leonard Smith Sherwood, AR Member
- Barbara Snowden West Haven, CT Member

Staff

- Terrie English TAP Director
- Robert Rosalia Program Analyst
- Matthew O'Sullivan Program Analyst
- Tamikio Bohler Wage and Investment
- Cindy Jones Wage and Investment
- Annie Gold Administrative Assistant

Roll Call

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. A review of the Agenda was shared.

- Outreach Committee will meet on April 09, 2020 beginning at 1:00 pm EST. The Lead for this committee is the TAP Vice Chair and is attended by all the Vice Chairs of the Project Committees
- Joint Committee scheduled meeting is on April 23, 2020 beginning at 1:30 pm EST. The call information has been posted on www.TAPSpace.org The TAP Chair, Project Committee Chairs will be attending. Members were encouraged to attend



- The Internal Communications Committee must be established. More information will be shared with the date and time

National Office Report

Terrie English welcomed everyone on the call and stated:

- Information is being received daily on the COVID-19. Members were advised to visit www.irs.gov for the most current updates on COVID-19, Stimulus payments and the Extended Tax Filing date July 15, 2020.
- There is a scam going around individuals are going to residences stating they are from the Government offering masks. They ask the person who answers the door to try the mask on. The mask is laced with a chemical that will render unconsciousness. Then they enter and rob the residents. A word of caution was extended to members to be careful and informed family and friends. It is increasingly difficult to identify due to them wearing masks and gloves.
- Recruitment has been extended to April 20, 2020. Members were encouraged to do virtual Outreach to make individuals aware that TAP is still recruiting.

Comments from the public

None

Chair Report

Tracy Bunner informed the committee the March minutes will be approved during the next scheduled meeting in May.

Robert Rosalia shared the following action items:

- Project 40907 CP90 Notice response was received most of the responses stated:
Under Consideration—Follow-up Date: 04/30/2020
This change can be considered in conjunction with a project team looking at redesign of the notice.
- Committee agreed to wait for the follow up response before making a determination to accept the IRS responses.

Subcommittee Reports

Subcommittee 1

Paul Berlage stated Subcommittee 1 had their meeting on last week. They had a great response on **#42226** - Collection Letter LT16. All members participated and discussed their notes. The subcommittee will carry over work to their next meeting and it should be ready for next month's Project Committee meeting. Berlage added time is of the essence and feedback is needed. He is looking forward to working with the members.



Subcommittee 2

Members are continuing to work **#42225** - CP14. This issue requires a lot of work. There are some actions items that still need work completed. The project is being finalized and should be ready for next month Full Committee discussion.

Robert Rosalia added:

- Members were encouraged to look over the Annual Report. Gilbert Martinez will be sending a copy to each member. Members will be assigned to work on the committee.
- The Screening Report has time sensitive projects to be worked. Rosalia received two project proposals for Letters 17 and Letters 19. He shared them with Tamikio Bohler. There is a design team reviewing the letters for redesign. Background information will be provided to the committee.
- Discussions will be held with Jimerson on meeting the deadline.
- Subcommittee 1 assigned to work Letter 19
- Subcommittee 2 assigned to work Letter 17

Screening Committee Report

The Screening Committee will determine when to meet based on committee work and will discuss further in May.

Outreach Report

Felecia Dixon shared the following:

- An Email was shared with members on last week with updates
- The first Outreach meeting will be held on tomorrow April 09, 2020
- Members were encouraged to think of ways to move forward with different Outreach Activities
- Members encouraged to share News Release in their communities by utilizing the PSA (Public Service Announcements). Dixon stressed to not be afraid to reach out.
- Activity Reports are due every month on the 25th.
- The reports are extremely important. They help show how TAP is valuable and valid
- Members reminded to use the full date on the report in order for the total hours to be calculated
- Do not copy and paste. Information must be manually input on the report
- Members encouraged to reach out to LTAs for any activities they may have planned and try and participate as an Outreach event. Communicate with the LTAs the Stakeholder Liaisons and each other
- Rosalia talked with everyone about connecting with their LTA and, if need, will provide the LTA information with them.
- The Activity spreadsheet has a glitche in it but is being looked at
- The first meeting for the Newsletter has not been scheduled. There will be an invite sent to members in the next few days.



- Members are encouraged to submit articles or Outreach events to be included in the Newsletter

Action Items

Rosalia stated he will do the following action items:

- Update the system with Subcommittee 1 finishing work on Letter 16 and begin work on Letter 19.
- Update the system with Subcommittee 2 finishing work on Letter 17 and CP14 project.
- Send information for the Joint Committee's monthly meeting to the Full Committee
- Email members copy of the Activity Report User Guide

Jimerson added the TAP Staff is available to assist members when needed.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, May 13, 2020,
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 2:00 p.m. PT**

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