



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 12, 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
- Ronald Fitzherbert Las Cruces, NM Member
- Bradford Folta Jr. Gardiner, ME Member
- Charles Jones Green Cove Springs, FL Member
- Michael Shamgochian Petersham, MA Member
- Kimberly Shepherd Monroe, LA Member
- Leonard Smith Sherwood, AR Member

Members Absent

- Barbara Snowden West Haven, CT Member

Visiting Member

- Robert Moretti Great Falls, MT TAP Vice Chair

Staff

- Robert Rosalia Program Analyst
- Matthew O’Sullivan Program Analyst
- Antonia Keeling Program Analyst
- Michael Odom W&I
- Annie Gold Administrative Assistant

Roll Call

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call and gave an overview of the agenda. Terrie English could not be on the call today for the National Office Report. Jimerson filled in with the following:

- Quarterly Virtual TAP meeting will be held on August 17, 2020 beginning at 1:00 p.m. ET. There will be virtual training and information shared on the current events happening within the TAP program
- The Outreach Committee meeting will be held on August 20, 2020 beginning at 12:00 p.m. ET
- The Annual Planning Session for the Joint Committee will meet before the end of this month. The Chairs of the Project Committees will all attend the



- session. They will review how the year has gone, the different projects for the upcoming year, discuss the presentative for the Chair and different items involving TAP. There will be two days of two-hour sessions on each day. The first session will be held on August 25, 2020 and the other one on August 26, 2020. They both will begin at 1:30 p.m. ET
- Joint Committee monthly meeting will be held on August 27, 2020 beginning at 1:30 p.m. ET. They review the project referrals and receive updates from the project committees
 - Internal Communications Committee (ICC) meeting is scheduled for August 25, 2020 beginning at 3:00 p.m. ET. They will work to reschedule the meeting due to a conflict with the Planning Session. Matthew O'Sullivan will reach out to members to move the time or date of the meeting
 - A solicitation was sent out to each member asking for volunteers to participate on the 2020 Annual Report Committee. Members who did not receive the email were encouraged to let Gilbert Martinez the Joint Committee Analyst know if they are interested in joining
 - There are three Full Committee meetings remaining for the TAP year. Appreciation was expressed to members for their commitment and work being done

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

NCC July 8, 2020 Minutes were approved as submitted

Public Comments

None

Response Action Items

Robert Rosalia stated he is waiting for five projects responses.

Program Owner's Report

None

Subcommittee Reports

Subcommittee 1

Leonard Smith stated Subcommittee 1 is working along with Subcommittee 2 on the CP2000 language project (#43347) and will be ready to be approved after Subcommittee 2's report out. The improve notice CP15 (#40908) project was a project held in the parking lot from last year. Even though they looked at a few different notices for this project they only found potential recommendations on the CP515. Decision was made to renamed the project to reflect the notice reviewed (CP15.)



- **Project #40908 – Improve Notice CP515:** Subcommittee renamed project to Improve Notice CP515 from Improve Notice Language of CP108; CP516/CP518.

Decision: Full Committee Consensus to forward Issue 40908 to the Joint Committee for approval to go to the IRS, contingent upon feedback from Systemic Advocacy (SA) and Attorney Advisory (AA), after Quality Review (QR).

Subcommittee 2

Charles Jones reviewed information Subcommittee 2 is working that was shown on WebEx presentation. The Subcommittee are still in the process of working on the ITIN Rejection Notice- CP567 (#39747.) They discussed the recommendations on CP2000 Paragraph (#43347) and agreed with what Sub 1 had and added a few of their own.

- **Project 43347 – CP 2000 Paragraph Language** Discussion by the Full Committee a consensus was made on #43347 to move forward with recommendations.

Decision: Full Committee Consensus to forward Issue 40908 to the Joint Committee for approval to go to the IRS, contingent upon feedback from Systemic Advocacy (SA) and Attorney Advisory (AA), after Quality Review (QR).

TAP Annual Report

Bunner stated volunteers were needed to submit a blurb for the Newsletter on CP2000 Paragraph Language Notice and the CP515 Notice. Folta volunteered to complete Both. He will have the submission completed and sent to Rosalia, Smith and Bowser by August 22, 2020.

Screening Committee Report

Bunner stated a copy of the report was received from Rosalia. The Screening Committee didn't hold a meeting, but the report was looked at by her and Folta and they didn't see any potential issue to work into projects. They discussed an issue with the letter of deficiency and suggested we start work on the notices. Subcommittee 1 agreed to review the LT 3219C and Subcommittee 2 will look at the 3219A. Rosalia will complete additional research and share with members the notices.

- **LT 3219C** assigned to Subcommittee 1
- **LT 3219A** assigned to Subcommittee 2

Outreach Report

Felecia Dixson shared the following:

- She participated in the Tax Forum virtually
- Bowser participated in the Tax Forum and shared her experience during her time there. She thought the chat rooms were a very good set up
- Members were encouraged to participate in the Tax Forums

Internal Communications Committee

Bowser share the following updates from July:

- ICC considering making a change to their Facebook presence by eliminating the Facebook group and making it a page. The difference is the Facebook group covers internal format and internal resource for TAP. A Facebook page is more for public engagement. They will wait to make a final determination for the www.TAPSpace.org updates as it may solve this issue. The www.TAPSpace.org is updating its platform from 2006. The redesign project is to make it more modern, with more current technology
- Due to COVID-19 the mailing of the 2019 Annual Report has been provided in an electronic version. Members who need a copy were encouraged to let Bowser know and she will make sure to forward them a copy
- Articles for the Newsletter submissions are needed by August 22, 2020
- Member were encouraged to share any Outreach activities as soon as possible
- Bowser will share the Outreach from the Virtual Tax Forum with members

Action Items

Rosalia stated he will do the following action items:

- Rename **Project 40908** to **Improve Language CP515**
- **Project 43347, CP2000 Language** and **Project 40908 to Improve Language CP515**, have been approved to go to the Joint Committee contingent upon feedback from Systemic Advocate and the Attorney Advisor after Quality Review.
- Quality to send Matthew O'Sullivan with a cc to Rosalia by August 18, 2020.
- Add the July 08, 2020 Minutes for posting
- Will send out documents for Subcommittee 1 (assigned LT 3219C) and Subcommittee 2 (LT 3219A) for them to start the project work.

Roundtable

Jimerson reminded members to include in all emails

TaxpayerAdvocacyPanel@irs.gov for FACA record keeping purposes.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, September 9, 2020,
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 10:00 a.m. PT**

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