



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 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
- Bradford Folta Jr. Gardiner, ME Member
- Charles Jones Green Cove Springs, FL Member
- Michael Shamgochian Petersham, MA Member
- Kimberly Shepherd Monroe, LA Member
- Member

Members Absent

- Ronald Fitzherbert Las Cruces, NM Member
- Leonard Smith Sherwood, AR Member
- Barbara Snowden West Haven, CT Member

Visiting Members

- Phillip Kleiber Roswell, GA TAP Chair
- Robert Moretti Great Falls, Montana TAP Vice Chair

Staff

- Terrie English TAP Director
- Robert Rosalia Program Analyst
- Matthew O'Sullivan Program Analyst
- Antonia Keeling Program Analyst
- Tamikio Bohler Wage & Investments
- Michael Odom Wage & Investments
- 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.

National Office Report

Terrie English welcomed everyone on the call and stated:



- Tax Forums are starting on July 21, 2020 through August 20, 2020. Fred Smith, Outreach coordinator forwarded information through Email to each member. When IRS is not in sessions, booths will be set up for each organization to have input. There will be a chat room available to share experiences, information about TAP and receive issues. The Publication room will have documents available for downloading. Smith will be having a meeting to explain how to work the chat room. The Outreach committee will have information as well. Members were encouraged to join.
- Taxpayer First Act Office will be conducting a forum and the IRS has asked the Joint Committee to join them on July 16, 2020. They will be asking questions about individual experiences with IRS.
- Reminder to file Tax Returns by deadline of July 15, 2020
- TAP was mentioned in The General Report to Congress on pages 72 and 223. Members were encouraged to read over the Report
- Joint Committee monthly meeting is scheduled for July 23, 2020 and members are encouraged to join in on the call

Public Comments

None

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

NCC June 10, 2020 Minutes were approved.

Action Items

Robert Rosalia stated four completed projects were approved by the Joint Committee and forwarded on to the IRS. He is waiting for their responses.

Program Owner's Report

None

Subcommittee Reports

Subcommittee 1

Paul Berlage stated Subcommittee 1 and Subcommittee 2 worked on the same project on the CP2000 Notices. Rosalia sent the referral for:

Subcommittee 2

Charles Jones added Subcommittee 2 did the same as Subcommittee 1 and reviewed the language from Subcommittee 1 and added some additional language that was shared with the full committee.

- **Project #39806**, the product of both Subcommittees work was reviewed. Opened for discussion by Full Committee on ID #1860 of the project, Rosalia the recommendations to clarify the committee's determination.
- They anticipate the referral will be forward on today to the Joint Committee if approved.



Decision: Full Committee Consensus to forward Issue 39806 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).

Rosalia added the recommendation from Subcommittee 1 and Subcommittee 2 was forwarded to Systemic Advocacy and Attorney Advisor at the committee's request. The Quality Review team made up of Shepherd and Shamgochian will review and forward what they have to Berlage. He will forward the final copy to Rosalia by July 14, 2020.

TAP Annual Report

Bunner stated the responses for the paragraphs to be reviewed, have been completed and submitted. Bunner will complete the blurb for the CP 2000 so that it could be incorporated into the Newsletter and TAP Annual. This will be completed by July 22, 2020.

Screening Committee Report

Bunner stated Rosalia shared a copy of the Screening Report with members in the pre-reads. Five issues were transferred to other project committees and fifteen issues were dropped.

Discussion was held on the issues in the Parking Lot. It was decided the following issues would be worked:

40908 – Improve Notice Language of CP108; CP516/CP518 IMF; and CP515 IMF: assigned to Subcommittee 1

39747 – ITIN Rejection Notice-CP567: assigned to Subcommittee 2

Outreach Report

Felecia Dixon thanked members for getting their Activity Reports completed and turned in. Members were encouraged to reach out to their LTAs and let them know their availability to participate in virtual outreach. Members with ideas for possible Outreach were encouraged to share with the committee. Dixon is available for any questions.

Action Items

Rosalia stated:

- CP 2000 Notice approved to go to the Joint Committee contingent upon SA and AA feedback.
- The Quality Review team will have the final copy of the referral to Rosalia by July 14, 2020.
- Both Subcommittees are going to work on the CP 2000 paragraph language (Project ID number to be determined)
- Rosalia will send out project information for Subcommittee 1 to work project #40908 and Subcommittee 2 to work project #39747
- Screening Committee determinations will be finalized in the internal system and five issues transferred to their determined committees and fifteen dropped.



- Blurbs will be sent by Bunner to Leonard Smith and Shani Bowser on the CP 2000 for the Newsletter

Roundtable

Jimerson expressed appreciation to the Full Committee. Members were encouraged to continue to be safe.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, August 12, 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.