



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 10, 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
- Leonard Smith Sherwood, AR Member

Members Absent

- Ronald Fitzherbert Las Cruces, NM Member
- Charles Jones Green Cove Springs, FL Member
- Michael Shamgochian Petersham, MA Member
- Kimberly Shepherd Monroe, LA Member
- Barbara Snowden West Haven, CT Member

Staff

- Terrie English TAP Director
- Robert Rosalia Program Analyst
- Matthew O’Sullivan Program Analyst
- Antonia Keeling Program Analyst
- Tamikio Bohler Wage & Investment
- Michael Odom Wage & Investment
- Annie Gold Administrative Assistant

Roll Call

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call.

- The Internal Communications Committee (ICC) meeting is scheduled for June 23, 2020 beginning at 3:00 p.m. ET. They will be working on various projects internally and externally to the public such as the Newsletter and Facebook presence. All articles should be forwarded to Matthew O’Sullivan by the 25th of each month. This will ensure the Newsletter is published by the 5th of the following month.
- The Interview phase of Recruitment for TAP year 2021 is expected to wrap-up by the end of the month. Appreciation was expressed to members who volunteered to assist with the Interviews.



National Office Report

Terrie English welcomed everyone on the call and stated:

- Some IRS offices have re-opened. Others will begin to reopen with guidelines by the states. Some Call Centers are opening with limited staff. Daily updated information is available on www.IRS.gov website.
- Members Business Cards and ID Badges will be mailed once the office opens at 1111 Constitution Ave., NW, Washington, DC.
- Tax Forums will be held virtually this year. They are looking at ways to interact with TAP members. Fred Smith, the Outreach Analyst will share information with the Analysts who will share with members.
- The All TAP Virtual meeting will be held on June 18, 2020. Members will receive updates. The Executives and the National Taxpayer Advocate, Erin Collins will be on the call and she will have a session for questions and answers.
- The Joint Committee will have their meeting on June 25, 2020. Members were encouraged to join in on the call. The meeting will provide information for those who are interested in becoming a Chair.

Public Comments

None

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

The NCC May 13, 2020 Minutes were approved with correction.

Action Items

Robert Rosalia stated that responses were received, and the IRS responded favorably regarding the following Projects:

- **40907**, CP Notices 515, 518
- **38267**, CP 90

Decision: Full Committee Consensus to accept IRS response and close both Projects

Action Item: Berlage will write-up a submission for the Newsletter on #38267 CP 90 and Folta will complete issue #40907, CP Notices 515, 518. They will forward a copy to Shani Bowser and Leonard Smith for review and Bunner for the TAP Annual Report.

Subcommittee Reports

Subcommittee 1 and Subcommittee 2

Paul Berlage stated Subcommittee 1 and Subcommittee 2 held identical virtual meetings last week.

- Office of Taxpayer Communications (OTC) made a presentation on the CP 2000



- Discussed CP2000 Notice and how they were sent out to taxpayers based on several different scenarios.
- Discussed the different sections of the Notice and the different paragraphs that are generated based on the taxpayer's specific situation.
- Tracy Bunner and Felicia Dixson provided a list of the most common paragraph they encounter, and the two subcommittees divided the paragraphs for review.
- Rosalia will share with members information that includes the notices by scenario and paragraph language.

TAP Annual Report

Bunner stated that the two responses received on issue #40907 CP Notices 515, 518 and issue #38267, CP 90 were assigned to Folta and Berlage. The issues were given to Rosalia, Bowser and Smith to make the update to the newsletter. It was suggested to change the due date from the 25th to the 20th, so it can make the ICC final newsletter deadline date. Berlage agreed to the change

Screening Committee Report

Bunner stated due to the size of the CP2000 project, the Screening Committee has not had a meeting yet but will schedule a meeting in the upcoming weeks. To keep focus on the CP 2000 project, the issues in the Parking Lot will remain there until further notice.

Outreach Report

Felicia Dixson shared the following:

- Encouraged everyone to go to the Taxpayer Advocacy Facebook page and review it. A lot of content can be shared on individual Facebook page, business or personal page to alert to people about TAP.
- If there are any questions, members were encouraged to reach out for assistance
- There are different subscriptions available through www.irs.gov website to find out what is happening
- Bowser and Smith will add their Outreach activity for the month to be included in the Newsletter. Members were reminded to share any Outreach they may have.
- Smith encouraged members to join social media and send information to alert friends by using the different available options

Action Items

Rosalia stated he will do the following action items:

- Forward approved May 13, 2020 Minutes for posting
- Update SAMS with accepted IRS responses for Issue #40907 and Issue #38667
- Send the CP2000 information and additional notices needed to the Subcommittees
- Forward Bowser her Stakeholder Liaison contact information and if others needed it to let him know.

Roundtable

- Dixon added when submitting Activity Reports to make sure the subject line reads as highlighted in all responses. Appreciation was expressed to members for getting their Outreach Reports in timely.
- Rosalia clarified Subcommittee 1 meeting change due to the Holiday. He will send an email to members.
- Bunner added that Folta and the Quality Review team (QR) completed the QR for issue #42226 Letter 16, #42413 Letter 17, #4225 CP 14 and #42425 Letter 19. All necessary steps by NCC were completed, and they are with the JC for official approval this month.

Jimerson expressed appreciation to the Full Committee. If any member should have questions or need assistance, TAP Management and Staff are available for assistance.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, July 08, 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.