



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 26, 2020**

Designated Federal Officer

- Terrie English TAP Director

Attendance

- | | | |
|-----------------------|------------------------|--------|
| • Paul Berlage | Cincinnati, OH | Member |
| • Shani Bowser | Harrisburg, PA | Member |
| • Tracy Bunner | Farr West, UT | Member |
| • Felecia Dixson | Rolla, MO | 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 |

Member Absence

- | | | |
|----------------------|----------------|--------|
| • Barbara Snowden | West Haven, CT | Member |
| • Ronald Fitzherbert | Las Cruces, NM | Member |

Staff

- | | |
|------------------|--------------------------------|
| • Terrie English | TAP Director |
| • Kevin Brown | TAP Administrative Assistant |
| • Robert Rosalia | Management and Program Analyst |
| • Fred Smith | Senior Program Analyst |

Welcome/Announcements/Review Agenda/TAP Mission

English opened the call and welcomed all who attended. English explained that due to the current health crisis we are dealing with, travel was cancelled, which caused this meeting to be virtual. As a result, the format for this meeting had been shortened for teleconference.

English reported the filing deadline has been extended to July 15, 2020. In addition, IRS offices were closed due to the pandemic. English reviewed the TAP mission, charter and overall goal for the committee. English explained how this federal advisory committee works under the Taxpayer Advocate Services (TAS).

English shared examples of some of the successes that the TAP has had in changing things in the IRS for the taxpayer's benefit. Longer extensions to file returns and the customer callback features are two that TAP recommended.

Self-Introductions/Roll Call



Brown completed roll call; quorum was met. The members and staff introduced themselves. Rob Rosalia Rob conducted an Icebreaker by introducing himself and asking everyone to them about themselves.

Comments from the public

None

TAP Meeting Procedures

Rosalia covered TAP meeting procedures by explaining:

- Ground Rules
- Respect for each other and methods of communications
- Meeting etiquette, agendas, pre-reads, and quorum requirements
- Telephone & E-Mail Etiquette
- WebEx – Its use and importance of calling the conference number
- Minutes/Minutes Approval
- Agenda & Pre-Read Information
- TAPSpace/ImproveIRS.org/
- WebEx - Its use and importance of calling the conference number
- Activity Reports/Time Reporting

Rosalia reviewed the ground rules for the TAP as well as telephone etiquette for committee meetings. He also explained the minutes process and how they are approved as well as the quorum and consensus process. Rosalia explained the need to be prepared for meetings by reviewing the agenda and pre-read information. Finally, Rosalia explained the purpose and need for activity reports and reporting all time spent on TAP related duties and the methods by which we will communicate in this committee.

So You Want to Be A Chair?

- Nominations and Election Process (Chair/Vice-Chair)
- Nominate Candidates
- Self-Introduction/Bios
- Voting

Rosalia explained, in detail, the process of working issues and how they flow through TAP and to the IRS. The process starts from a systemic issue, to the screening committee, subcommittee, through the full committee, to the joint committee to the IRS and on to the TAP Annual Report. Rosalia also explained all the duties of committee's leadership and sent the committee a workflow chart and narrative. Rob discussed requirement to meet Quorum, as 50% of membership plus one in order to approve any action that require a vote; such as referrals to IRS and meeting minutes.

Rosalia and English spoke to members about how to do virtual outreach and what to do about media interactions. Rosalia and Dixson discussed a recent virtual outreach they conducted together, and they shared the PowerPoint with the NCC committee for use. Bunner and Dixson ran unopposed for both the Chair and Vice Chair position.



Election Results

Tracy Bunner- Chair

Felecia Dixson- Vice Chair

End of Day/Announcements

Michael Shamgochian and Bradford Folta volunteered for the screening committee. Rosalia reviewed the agenda and English closed the call.



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| • Shani Bowser | Harrisburg, PA | Member |
| • Tracy Bunner | Farr West, UT | Chair |
| • Felecia Dixson | Rolla, MO | Vice-Chair |
| • Bradford Folta Jr. | Gardiner, ME | Member |
| • Kimberly Shepherd | Monroe, LA | Member |
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Welcome/Announcements/Review Agenda

English welcomed everyone to the meeting.

Roll Call

Brown completed roll call; quorum was met.

Comments from the public

None

Approval of November Minutes

Minutes approved with amendments. L. Smith motioned, Folta Seconded.
Wrap up section changed.

Establishment of Subcommittees and Meeting Dates

- Monthly Committee Meeting- Second Wednesday, 1pm ET
- **Subcommittee 1(A)**- First Tuesday 1:00 pm ET.
- Paul Berlage **Lead**



- Felecia Dixson
- Ronald Fitzherbert
- Bradford Folta Jr.
- Leonard Smith
- **Subcommittee 2(B)**- First Wednesday 1:00 pm ET.
- Charles Jones **Lead**
- Shani Bowser
- Tracy Bunner
- Michael Shamgochian
- Kimberly Shepherd
- Barbara Snowden

(Subcommittee 1 will meet on April 1, 2020 at 11:00 am ET just for the first meeting.)

- **Outreach** (Vice-Chair)- Dixson
- **Quality Review** (QR)- Folta, Shamgochian, Shepherd, Shamgochian and Shepherd will send there QR to Folta
- **Internal Communications** (IC)- Bowser, Smith
Meeting will be established by TAP Staff and forwarded at later date.
- **Screening Committee**- Bunner, Folta, Shamgochian

Rosalia explained what the Screening committee does and how the process works. Bunner discussed the process that she would like to use for the screening process. She proposed that all three screening committee members use the provided excel sheet from Rosalia and input their comments into the notes field of the provided sheet prior to the meeting. We can send Rosalia the copy with notes to be used on WebEx when we have the meeting. This will allow everyone to voice their opinions even if they can't make the call. Meeting dates and time will be established on an Ad-hoc basis. Shepherd expressed interest in joining from time to time and was instructed to just let the committee know when she wanted to come to the meeting. Rosalia informed the committee that he will send the determinations out to the full committee prior to their meeting so they can look at the results and, if wanted to weigh in on the issue before anything was dropped or transferred.

Rosalia explained how an issue flows from start to finish to include the areas in TAS that it goes through. Rosalia will send the PowerPoint documents to the committee via email. The staff explained what the Internal Communications committee and the Outreach committees do and the options that TAP has for social media outreach.

Waiting for IRS Responses

- 40907 - CP Notices: 04; 515IMF; 518BMF

Rosalia will share any response from the IRS as soon as it comes in.

Review of IRS Responses

- 38667 - CP90 Notice



This process was explained so new members understand what the committee does with responses from the IRS and what steps does to respond to these responses. Bunner proposed changing the format of the recommendation form so what we submit to the IRS flows easier and is easier to understand. This will also allow us to better understand the IRS response to our recommendation. The conversation compared the short form to the long form. Folta explained the reason for the format change and how it would make the recommendation easier to understand for the committee and perhaps even the IRS.

English stated that this form is used by all committees other than the Tax Forms and Publications committee based on how many recommendations they propose and the nature of their committee. English noted that this must be elevated to the appropriate operating division first before we can change the format, we use to submit recommendations by this committee. Rosalia explained the differences in the short and long referral forms and that he will be able to put the recommendations into a format for the IRS no matter how they are received.

Parking Lot

Rosalia explained how items go into the parking lot for the new members to understand what it is. Rosalia reported there are about 20 items for screening at this time. Bunner agreed that with the projects from the IRS as well as the ones in the parking lot we will hold off on having a screening call.

- 40908 - Improve Notice Language of CP108; CP516/CP518 IMF; and CP515 IMF (response to questions received)
- 39747 - ITIN Rejection Notice-CP567
- 41232 - Terrible wording of Notice CP220
- 40117 - Letter 2645C
- 41232 / 39806 / 41415 - CP 2000

2020 Project Committee Work

The following were received by the IRS for project start:

- 42225 CP14- Assigned to **Subcommittee 2**
- 42226 Collection Notice LT16- Assigned to **Subcommittee 1**

Meeting Assessment / Next Steps / Closing

Bunner reminded the committee to start preparing for the next meeting by reviewing the pre-reads. English thanked everyone for their participation on the call and looks forward to what the committee gets done this year. English closed the call.

**Next Meeting: Wednesday, April 8, 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.