



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 13, 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 Dixon | 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 |
| • Leonard Smith | Sherwood, AR | Member |
| • Robert Moretti | Montana | TAP Vice Chair |

Members Absent

- | | | |
|---------------------|----------------|--------|
| • Kimberly Shepherd | Monroe, LA | Member |
| • Barbara Snowden | West Haven, CT | Member |

Staff

- | | |
|----------------------|--------------------------|
| • Terrie English | TAP Director |
| • Robert Rosalia | Program Analyst |
| • Rosalind Matherne | Program Analyst |
| • Tamikio Bohler | W&I |
| • Brian Wright | IRS OTC |
| • Jacqueline Masters | IRS OTC |
| • Annie Gold | Administrative Assistant |

Roll Call

Quorum was met.

Welcome

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

- Joint Committee will meet on May 28, 2020 beginning at 1:30 p.m. ET. The meeting is open to the public. Members were encouraged to attend
- The Internal Communications Committee meeting is scheduled May 26, 2020 beginning at 3:00 p.m. ET. They will be working on various projects such as the Newsletter and Facebook presence
- Outreach Committee will meet on May 21, 2020 at 12:00 p.m. ET. The Vice Chair of the Project Committees and the National Vice Chair, Robert Moretti



- The Interview phase of Recruitment will begin at the end of the month. A solicitation will be going out for volunteers to be a part of the interview process

National Office Report

Terrie English welcomed everyone on the call and stated:

- Meetings have been going on about the status with the Corona virus and what is happening across the nation
- Information is being shared on the news media and www.IRS.gov Some information on when to expect the Stimulus payments, the deadline for getting information to IRS to receive a direct deposit and informing Taxpayers if information is not received, a paper check will be mailed. The website is updated daily.
- English is in the process of getting someone to come and speak with members and share information on what areas or campuses will be opening. Information will be shared on what the effect will be going forward
- There will be a virtual meeting coming soon for members and the Staff. Virtual training will be provided for new members as well as returning members
- Appreciation was expressed to members as we go through this pandemic
- Paul Berlage asked if there had been any information on an issue trying to login and enter personal information on the www.IRS.gov website. When trying to find out if they would be receiving a Stimulus payment or not. There was an issue with entering in all capital letters only was informed status unavailable. English responded that the IRS already addressed the issue and it was corrected.

Comments from the Public

None

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

NCC Minutes for the following were approved as submitted

- March 11, 2020
- April 8, 2020

Action Items

Robert Rosalia stated he did a follow up the needed responses they were waiting for from IRS to forward to the Full Committee.

Program Owner's Report

Brian Wright from Taxpayer Correspondence shared a Power Point presentation on three types of Correspondence generally sent by IRS. He gave an overview of several types of Notices:

- CP Notices are systemically generated
- Informational Notices



- Balance Due Notices
- Balance of Refunds
- Notices in Demand
- Collection Due Process (CDP)

Repudiatory Notices

- CRX Letters

Information can be found on www.IRS.gov for explanation of Letters

Subcommittee Reports

Subcommittee 1

Paul Berlage stated Subcommittee 1 had their meeting last week. They completed the referrals for #42226 Letter 16 and #42413 Letter 17. The subcommittee all worked diligently and in a timely fashion. The Subcommittee is recommending the referrals be forwarded to the Joint Committee contingent upon feedback from AA and SA after QR.

Decision: Full Committee approved Issues 42226 and 42413 to go 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). If the feedback is not received in time for Joint Committee meeting, recommendations surrounding design will be sent to the IRS as Draft.

Subcommittee 2

Charles Jones stated Subcommittee 2 has been working on #4225 CP 14 and #42425 Letter 19. Their focus was on the verbiage with recommendations to the format and the Subcommittee completed the projects. The Subcommittee recommended the referrals be approved by the Project Committee to go to the Joint Committee contingent upon feedback from AA and SA after QR.

Decision: Full Committee approved Issues 42225 and 42425 to go to the Joint Committee for approval to go to the IRS contingent upon feedback from AA and SA after QR. If the feedback is not received in time for Joint Committee meeting, recommendations surrounding design will be sent to the IRS as Draft.

Bunner stated volunteers are needed to work on submitting a blurb for the TAP Annual Report as well as newsletter. Rosalia will send a sample to members on key items to include in the passages for the Annual Report.

- Bunner volunteered for Letter 19 #42445
- Shamgochian volunteered for CP14 #42225
- Berlage volunteered to do Issue CP16 #42226, and CP 17 #42413

Screening Committee Report

Bunner stated Rosalia sent a list out to the Screening Committee on Issues that were submitted. There will be a Screening Committee meeting to review the items on the report. Issues in the Parking Lot were reviewed for project start. Bunner stated that she will like to work on the CP2000. Since this is a big project, with multiple issues, the suggestion was to break it out into 2 subcommittees. Screening



Subcommittee 1 would look at the first half and Screening Subcommittee 2 would look at the second half. Berlage suggested that both subcommittees review all the language before deciding what half each Subcommittee will work on. Rosalia will provide all the information that has been provided and any previous referrals on CP2000 for members to review before deciding.

Outreach Report

Felecia Dixson shared the following:

- Thank you expressed to members for turning in their Activity Reports
- Dixson will begin reaching out to members to find out if they have any Outreach events such as Facebook activity.
- Members were encouraged to share activity through email
- Dixson has administrative permissions to the Facebook page
- Reminder to enter information in the 'Subject Line' of all emails

Action Items

Rosalia stated he will do the following action items:

- March and April minutes were approved and will be sent for publishing
- Approved four projects for Letters 16, Letters 17, CP14, Letter 19 to go to the Joint Committee depending upon feedback from Systemic Advocacy and Attorney Advisory, after Quality Review
- Michael and Kimberly will share their QR on the four projects by email with Bradford Folta. Folta will return the final QR to Rosalia by the 20th
- Rosalia will gather all the CP2000 project information and forward it to all NCC members

Jimerson expressed appreciation to the Full Committee and reminded members TAP Management and Staff are available for assistance.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, June 10, 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.