



**Notices and Correspondence Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, October 14, 2020**

**Designated Federal Officer**

- Susan Jimerson Chief, TAP West

**Attendance**

- Paul Berlage Cincinnati, OH 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

**Members Absent**

- Shani Bowser Harrisburg, PA Member
- Michael Shamgochian Petersham, MA Member
- Kimberly Shepherd Monroe, LA Member
- Leonard Smith Sherwood, AR Member
- Barbara Snowden West Haven, CT Member

**Staff**

- Robert Rosalia Program Analyst
- Matthew O’Sullivan Program Analyst
- Rosalind Matherne Program Analyst
- Michael Odom W&I
- Dale Hawkins W&I
- Leslie Henley W&I
- Annie Gold Administrative Assistant

**Roll Call**

Quorum was met.

**Welcome**

Susan Jimerson opened the meeting and welcomed everyone to the call. She shared an overview of the agenda. TAP Director, Terrie English could not be on the call for the National Office Report. The following upcoming meetings were shared:

- The Outreach Committee meeting is scheduled for October 15, 2020 beginning at 12:00 pm, EDT. This committee is led by the TAP Vice Chair, Robert Moretti and attended by the Vice Chairs of the Project Committees

- The first draft of the Chair Report for the Annual Report is due to be turned in to Gilbert Martinez on October 16, 2020. Martinez is the Joint Committee Analyst and the Analyst in charge of the 2020 Annual Report
- There will be an informational session explaining what it is like to be a TAP Chair or Vice Chair is scheduled for October 20, 2020 at 3:00 pm, EDT
- Following the format of events for the upcoming TAP Chair and Vice Chair Election process, nomination or self-nominations are due on October 25, 2020 by 12:00 am, EDT. Members were encouraged to submit their interest by midnight on October 25, 2020
- Campaign statements are due October 30, 2020 by midnight and will be posted onto [www.TAPSpace.org](http://www.TAPSpace.org) by November 02, 2020
- There will be a meet the candidates session held on November 05, 2020 at 3:00 pm, EDT and voting ballots will be sent to members by November 06, 2020.
- Votes are due to be turned in on November 13, 2020 by midnight. Results will be shared on November 17, 2020
- There will be a mentorship program meeting on October 21, 2020 at 3:00 pm, EDT. Calendar invites have been sent to members that have expressed interest
- Joint Committee monthly meeting will be held on October 22, 2020 beginning at 1:30 pm, EDT. TAP Chairs and Vice Chairs, Chairs from each project committee and Internal Communications committee will attend this meeting. Members were encouraged to join in on the call
- Internal Communications Committee (ICC) meeting is scheduled for October 27, 2020 beginning at 3:00 pm, EDT.

IRS has added a QR Code on [www.IRS.gov](http://www.IRS.gov) website to assist Taxpayers when looking for options on paying balances owed and Installment Agreements. Currently the QR Code is being used on the CP14 Notices. The Online 2020 Tax Forums information is available for viewing. There is a lot of good information on the website and members were encouraged to use the information provided.

The Recruitment package is in the approval phase and being reviewed to go through the final approval path.

### **Chair Report**

Tracy Bunner welcomed everyone to the call. The members discussed changing the November meeting from November 11, 2020 to November 12, 2020 due to the Veteran's Day holiday. Robert Rosalia will follow with the members who could not attend today's meeting to make sure they do not have any conflicts with the change.

### **Minutes Approval**

NCC September 9, 2020 Minutes were approved as submitted



Paul Berlage motioned, and Felecia Dixson seconded.

### **Public Comments**

None

### **Response Action Items**

Rosalia stated he is still waiting on several responses from IRS. He is anticipating a response by November's meeting.

### **Subcommittee Reports**

#### Subcommittee 1

Paul Berlage stated Subcommittee 1 had a productive meeting last week. They reviewed the Identity theft type letters Issue **43678** LT 5071C and **43679** LT 4883C. After discussion with the Full Committee, Subcommittee 1 will work to finalize their recommendation for next month's meeting. The Project was also shared with the Special Projects committee and any recommendations will be added to their discussion for the next subcommittee call where they anticipate project completion.

#### Subcommittee 2

Charles Jones stated Subcommittee 2 worked to finalize their referral on Issue **43572** LT 3219A. A discussion was held with the Full Committee on changes to the verbiage and website link. The Subcommittee recommendation is to forward this issue to the Joint Committee pending comments from Systemic Advocacy (SA) and the Attorney Advisors (AA) after Quality Review (QR).

Jones motioned and Dixson second to forward Issue **43572** LT 3219A to the Joint Committee contingent upon SA and the Attorney Advisor's review.

**Decision: Full Committee Consensus to forward Issue 43572 LT 3219A to the Joint Committee contingent upon SA and the Attorney Advisor feedback.**

Subcommittee 2 looked in the Parking Lot at Issue 40117 regarding Letter 2645C. They discussed the issue and they anticipate having a recommendation for next month's meeting. They will also share with Subcommittee 1 any information they have on the Identity Theft letters LT 5071C and LT 4883C. Subcommittee 1 is working.

### **TAP Annual Report**

Rosalia stated there are two blurbs. One was assigned to Michael Shamgochian that is outstanding and the second one on issue **43572** LT 3219A. Bunner will complete the blurb on the Letter of Deficiency for the Newsletter. Bunner encouraged members to submit articles to be included in the Newsletter.

### **Screening Committee Report**

Rosalia stated the increase calls related to COVID were divided amongst the Screening committees to review and determine if there were any issues to be worked. The Screening Committee will have an additional meeting prior to next month's meeting to pick up issues or carry over to the following year. Bunner added Subcommittee 2 will be working Letter 2645C. There are no other issues in the Parking Lot.

### **Outreach Report**

Felecia Dixson shared the following:

- A shared document with members was a good guide for posting information in social media
- LTAs and Rosalia have information that would be helpful in conducting Outreach
- Dixson took the opportunity to share TAP information with a Pastor, his wife and members of the church
- Members were encouraged to reach out to family and members within their communities.
- Members have been doing a great job with adhering to the activity report due date
- Members reminded to put any activity done relative to TAP on their Activity reports

### **Internal Communications Committee**

O'Sullivan informed the Committee the Newsletter articles are due to be submitted by the twenty-fifth of each month. It will be published by the fifth of the month. Rosalia reminded members to submit their articles to him by the twenty-third of the month.

### **Action Items**

Rosalia stated the following Actions Items:

- The next Full Committee meeting will be moved to November 12, 2020 at 1:00 pm, EDT
- Forward the September 09, 2020 approved Minutes for posting
- 50713 and 4883C Subcommittee 1 will look over again and Rosalia will include any information from Subcommittee 2 and the Special Projects committee
- Letter 2645 will be worked by Subcommittee 2
- Issue 3219A will be forwarded to the Joint Committee contingent upon the SA and AA after QR
- Information will be posted onto [www.TAPSpace.org](http://www.TAPSpace.org)

### **Roundtable**

- Bunner shared appreciation to member for their efforts in attending the meetings



- Jimerson expressed appreciation for all the work being done by the committee

**Closing**

Jimerson officially closed the meeting.

**Next Meeting: Thursday, November 12, 2020,  
1:00 pm EDT, 12:00 pm CDT 11:00 am MDT, 10:00 am PDT**

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