



**Notices and Correspondence Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, September 9, 2020**

**Designated Federal Officer**

- Susan Jimerson Chief, TAP West

**Attendance**

- Paul Berlage Cincinnati, OH Member
- Shani Bowser Harrisburg, PA 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
- Michael Shamgochian Petersham, MA Member

**Members Absent**

- Kimberly Shepherd Monroe, LA Member
- Leonard Smith Sherwood, AR Member
- Barbara Snowden West Haven, CT Member

**Staff**

- Matthew O'Sullivan Program Analyst
- Rosalind Matherne Program Analyst
- 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 and gave an overview of the agenda. TAP Director, Terrie English could not be on the call today for the National Office Report. The following upcoming meetings was shared:

- The Annual Report Committee will have their meeting on September 11, 2020. Jimerson will not be able to attend but will supply the time for the meeting upon request.
- The Outreach Committee meeting will be held on September 17, 2020 beginning at 12:00 pm, EDT.

- Internal Communications Committee (ICC) meeting is scheduled for September 22, 2020 beginning at 3:00 pm, EDT. Discussions will be held on various communications items such as the Newsletter, Facebook and other media items.
- Joint Committee monthly meeting will be held on September 24, 2020 beginning at 1:30 pm, EDT. The meeting is scheduled for 1.5 hours and varies depending on the number of project referrals.

### **Chair Report**

Tracy Bunner welcomed everyone to the call.

### **Minutes Approval**

Notices and Correspondence Committee (NCC) August 12, 2020 Minutes were approved as submitted. Paul Berlage motioned, and Felecia Dixon seconded.

### **Public Comments**

None

### **Response Action Items**

- Issue 43347, CP 2000 Paragraph Language, update made to ID #1986, the committee discussed changes and a recommendation was approved to forward to Joint Committee.  
**Dixon motioned and Berlage seconded**  
**Decision: Full Committee consensus was reached to forward issue 43347 to Joint Committee for approval**

### **Subcommittee Reports**

#### Subcommittee 1

Paul Berlage stated Subcommittee 1 discussed the CP2000 language:

- Issue 43573, 3219C Notice of Deficiency. They completed their recommendations that included a few grammatical changes.  
**Berlage motioned and Dixon seconded**  
**Decision: Full Committee consensus to forward Issue 43572 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).**

#### Subcommittee 2

In addition to discussing the CP2000 language, Subcommittee 2 reviewed the following:

- Issue 39747, ITIN Rejection Notice-CP567. They completed their project to add clarity to the product.  
**Dixon motioned and Shani Bowser seconded**  
**Decision: Full Committee consensus to forward Issue 39747 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).**

- Issue 43572, LT 3219A Notice of Deficiency. Additional work is being done on this project and it should be ready by the next project committee meeting.

**TAP Annual Report**

Bunner stated volunteers were needed to submit a blurb for the Newsletter on ITIN Rejection Notice. Shamgochian will complete this task.

**Screening Committee Report**

Bunner stated the Screening Committee reviewed issues that were received and decided to drop or transfer issues that did not apply to NCC. Issues 5071C and 4883C were brought in by Dixson and will be worked and assigned. Both Letters deals with Identity issues.

Subcommittee 1 will work on the following:

- Issue 43678 – LT 5071C
- Issue 43679 – LT 4883C

**Action Item: A copy of a sample redacted letter will be supplied to the Committee and shared by Robert Rosalia.**

**Outreach Report**

Felecia Dixson shared the following:

- Several members participated in the Tax Forum virtually.
- Dixson had a discussion with a Taxpayer regarding a personal issue.
- Outreach is difficult to complete but members were encouraged to be creative and utilize social media.
- Members were encouraged to document all activity on the Activity Reports. The information goes into the Annual Report and it's important to capture all the information accurately.
- Berlage added unemployment tax is a concern of Taxpayers
- Members were encouraged to reach out to their Local Taxpayer Advocates

**Internal Communications Committee**

Bowser stated Leonard Smith will be taking the lead for ICC for the remainder of the year.

**Action Items**

Matthew O'Sullivan stated he will share the Actions Items and notes with Robert Rosalia:

- Change the draft status of the August meeting minutes to final and request them to be posted to [www.TAPSpace.org](http://www.TAPSpace.org)
- Send Issue 43347 to the Joint Committee along with Issue 43572 and 39747 (contingent upon comments from Quality Review and the Attorney Advisor)
- Distribute copies of letter 5071C and 4883C for project start.
- Consolidate items into draft notes and forward to Rosalia for action

### **Roundtable**

Jimerson reminded the Committee a volunteer was needed to submit the blurb for the Newsletter. Berlage will do the blurb and it is due by the 25th of the month.

Thank you to O'Sullivan for filling in for Rosalia on today's call.

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, October 14, 2020,  
1:00 pm EDT, 12:00 pm CDT 11:00 am MDT, 2:00 pm PDT**

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