



**Notices and Correspondence Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, November 12, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- | | | |
|-----------------------|------------------------|------------|
| • Paul Berlage | Cincinnati, OH | Member |
| • Tracy Bunner | Farr West, UT | Chair |
| • Felecia Dixon | Rolla, MO | Vice Chair |
| • Ronald Fitzherbert | Las Cruces, NM | Member |
| • Charles Jones | Green Cove Springs, FL | Member |
| • Michael Shamgochian | Petersham, MA | Member |
| • Kimberly Shepherd | Monroe, LA | Member |
| • Leonard Smith | Sherwood, AR | Member |

Visiting Member

- Bob Moretti TAP Vice Chair

Members Absent

- | | | |
|----------------------|----------------|--------|
| • Shani Bowser | Harrisburg, PA | Member |
| • Bradford Folta Jr. | Baxter, MN | Member |
| • Barbara Snowden | West Haven, CT | Member |

Staff

- | | |
|----------------------|--------------------------|
| • Robert Rosalia | Program Analyst |
| • Matthew O'Sullivan | Program Analyst |
| • Rosalind Matherne | Program Analyst |
| • Michael Odom | Wage and Investment |
| • Leslie Henley | Wage and Investment |
| • 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 today for the National Office Report. The following upcoming meetings were shared:

- Mentorship program meeting on November 13, 2020 at 12:00 pm, EDT

- Internal Communications Committee (ICC) will have its last meeting of the year on November 17, 2020 beginning at 3:00 pm, EDT
- The Outreach Committee meeting is scheduled for November 19, 2020 beginning at 12:00 pm, EDT. The meeting will be led by Bob Moretti, the TAP Vice Chair.
- Joint Committee will have its final meeting on November 19, 2020 beginning at 1:30 pm, EDT and will be led by Phil Kleiber, the TAP Chair.
- The end of the year survey for members will be available soon. Members were encouraged to participate with comments to improve the TAP program.

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

October 14, 2020 Notices and Correspondence (NCC) Minutes were approved as submitted.

Paul Berlage motioned and Ron Fitzherbert seconded approval of the Minutes.

Public Comments

None

Response Action Items

Rosalia stated he received responses from the IRS regarding the following three projects:

- **Issue #40908 – Improve Notice Language of CP515**
IRS agreed to the first recommendation to remove the duplicate text on CP515. The second recommendation was not adopted but the committee discussed and agreed that if the text moved according to taxpayer issue, they agreed with the determination. They made the decision to accept the IRS responses and close the project as completed.
- **Issue #39806 – CP2000**
- **Issue #43347 – CP2000 Paragraph Language**
Two responses from IRS on the CP2000 was received. The committee will review at the end of the meeting

Subcommittee Reports

Subcommittee 1

Paul Berlage stated that Subcommittee 1 discussed the responses received from Systemic Advocacy (SA) and Attorney Advisors (AA) on **Issue #43678 LT 5071C** and **Issue #43679 and LT 4883C**. Rosalia explained that the responses received were based on opinion, not tax law, so the Subcommittee looked at the responses as feedback. Since the two projects were closely related and had similar recommendations, the Subcommittee will ask to move forward with them

under one issue number (**Issue #43678**) and request approval to move forward to the Joint Committee (JC.) after Quality Review (QR).

Bunner motioned and Jones seconded

Decision: Full Committee Consensus to forward Issue #43678 LT 5071C and LT 4883C to the JC for approval after QR.

Subcommittee 2

Charles Jones stated Subcommittee 2 worked to finalize their referral on **Issue #43572 LT 3219A - Notice of Deficiency** and **Issue #40117 - Letter 2645C**.

The Subcommittee recommended the projects move forward to the JC after QR.

Jones motioned and Dixon seconded

Decision: Full Committee Consensus to forward Issue #43572 - LT 3219A Notice of Deficiency and #40117 - Letter 2645C to the JC after QR.

TAP Annual Report

Bunner stated Letters 2645C, 50713C and 4883C will need to be added to the newsletter and the NCC portion of the TAP Annual Report to Congress. She is in the process of finalizing the Annual Report and will add the completed project. She requested write-ups include the number of recommendations in each referral and forwarded to her by the 22nd of November.

Screening Committee Report

Bunner stated the Screening Committee reviewed all the issues in the queue. The decision was made to drop the issues since many of them were Covid related and not issues that the committee would be able to address.

Outreach Report

Felecia Dixon shared the following:

- Members have been doing a great job conducting Outreach even though they were restricted due to Covid.
- Members were encouraged to reach out to their LTA and Congressmen for possible Outreach opportunities.
- Rosalia and Dixon are available for assistance and to answer any questions that might come up.
- Members were reminded to put any activity done relative to TAP on their Activity reports by the 25th of the month and continue to submit their reports timely.

Internal Communications Committee

Rosalia stated ICC discussed social media and the Newsletter during their last meeting.

- They also discussed the Facebook page and having an administrator for it. Matthew O'Sullivan informed the committee that Laurie Brock is the

- administrator for the Facebook page. They will revisit the issue after the first of the year.
- The Newsletter submissions have been timely, and members were encouraged to continue with submissions. Bunner will add comments on the Newsletter for November.
 - Rosalia mentioned the Mentorship program and asked Bob Moretti if he would share information. Moretti stated the Mentorship program is led by Martha Lewis and they were in the process of updating the initiative. There will be a mentor – mentee focus. They will have their next meeting on Friday, November 13, 2020 beginning at 12:00 pm, EDT. They will be utilizing PowerPoint worksheets and welcome any suggestions members may have.

Action Items

Rosalia stated the following Items:

- **Issue #40908 – Improve Notice Language of CP515** will be closed as project is completed.
- **Issue #43678 - LT 5071C and LT 4883C** approved to go to the JC
- **Issue #43572 - LT 3219A Notice of Deficiency** and **Issue #40117 - Letter 2645C** going to the JC after QR

Discussion was held by the Full Committee on the response to **Issue #39806 – CP2000** and **Issue #43347 – CP2000 Paragraph Language**. The two responses received from the IRS on the CP2000 was a blanket statement and all recommendations are “under consideration” and will be reviewed in September 2021. The committee will keep the project open and will review the response further next TAP year.

Roundtable

- Bunner shared appreciation to the members for submitting Newsletter articles which contributed to having a successful TAP year.
- Rosalia expressed his appreciation for an outstanding job this year and being able to achieve great results despite the many roadblocks that were encountered.
- Jimerson expressed appreciation to all members and the work that has been done by the committee

Closing

Jimerson officially closed the meeting.

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



**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 Dixon | 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 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 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 Dixon 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
- Dixon 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

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.



**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 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 |

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 Dixon 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 Dixon shared the following:

- Several members participated in the Tax Forum virtually.
- Dixon 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
- 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.



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 12, 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 |
| • Kimberly Shepherd | Monroe, LA | Member |
| • Leonard Smith | Sherwood, AR | Member |

Members Absent

- | | | |
|-------------------|----------------|--------|
| • Barbara Snowden | West Haven, CT | Member |
|-------------------|----------------|--------|

Visiting Member

- | | | |
|------------------|-----------------|----------------|
| • Robert Moretti | Great Falls, MT | TAP Vice Chair |
|------------------|-----------------|----------------|

Staff

- | | |
|----------------------|--------------------------|
| • Robert Rosalia | Program Analyst |
| • Matthew O'Sullivan | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Michael Odom | W&I |
| • 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. Terrie English could not be on the call today for the National Office Report. Jimerson filled in with the following:

- Quarterly Virtual TAP meeting will be held on August 17, 2020 beginning at 1:00 p.m. ET. There will be virtual training and information shared on the current events happening within the TAP program
- The Outreach Committee meeting will be held on August 20, 2020 beginning at 12:00 p.m. ET
- The Annual Planning Session for the Joint Committee will meet before the end of this month. The Chairs of the Project Committees will all attend the

- session. They will review how the year has gone, the different projects for the upcoming year, discuss the presentative for the Chair and different items involving TAP. There will be two days of two-hour sessions on each day. The first session will be held on August 25, 2020 and the other one on August 26, 2020. They both will begin at 1:30 p.m. ET
- Joint Committee monthly meeting will be held on August 27, 2020 beginning at 1:30 p.m. ET. They review the project referrals and receive updates from the project committees
 - Internal Communications Committee (ICC) meeting is scheduled for August 25, 2020 beginning at 3:00 p.m. ET. They will work to reschedule the meeting due to a conflict with the Planning Session. Matthew O'Sullivan will reach out to members to move the time or date of the meeting
 - A solicitation was sent out to each member asking for volunteers to participate on the 2020 Annual Report Committee. Members who did not receive the email were encouraged to let Gilbert Martinez the Joint Committee Analyst know if they are interested in joining
 - There are three Full Committee meetings remaining for the TAP year. Appreciation was expressed to members for their commitment and work being done

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

NCC July 8, 2020 Minutes were approved as submitted

Public Comments

None

Response Action Items

Robert Rosalia stated he is waiting for five projects responses.

Program Owner's Report

None

Subcommittee Reports

Subcommittee 1

Leonard Smith stated Subcommittee 1 is working along with Subcommittee 2 on the CP2000 language project (#43347) and will be ready to be approved after Subcommittee 2's report out. The improve notice CP15 (#40908) project was a project held in the parking lot from last year. Even though they looked at a few different notices for this project they only found potential recommendations on the CP515. Decision was made to renamed the project to reflect the notice reviewed (CP15.)

- **Project #40908 – Improve Notice CP515:** Subcommittee renamed project to Improve Notice CP515 from Improve Notice Language of CP108; CP516/CP518.

Decision: Full Committee Consensus to forward Issue 40908 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

Charles Jones reviewed information Subcommittee 2 is working that was shown on WebEx presentation. The Subcommittee are still in the process of working on the ITIN Rejection Notice- CP567 (#39747.) They discussed the recommendations on CP2000 Paragraph (#43347) and agreed with what Sub 1 had and added a few of their own.

- **Project 43347 – CP 2000 Paragraph Language** Discussion by the Full Committee a consensus was made on #43347 to move forward with recommendations.

Decision: Full Committee Consensus to forward Issue 40908 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).

TAP Annual Report

Bunner stated volunteers were needed to submit a blurb for the Newsletter on CP2000 Paragraph Language Notice and the CP515 Notice. Folta volunteered to complete Both. He will have the submission completed and sent to Rosalia, Smith and Bowser by August 22, 2020.

Screening Committee Report

Bunner stated a copy of the report was received from Rosalia. The Screening Committee didn't hold a meeting, but the report was looked at by her and Folta and they didn't see any potential issue to work into projects. They discussed an issue with the letter of deficiency and suggested we start work on the notices. Subcommittee 1 agreed to review the LT 3219C and Subcommittee 2 will look at the 3219A. Rosalia will complete additional research and share with members the notices.

- **LT 3219C** assigned to Subcommittee 1
- **LT 3219A** assigned to Subcommittee 2

Outreach Report

Felecia Dixon shared the following:

- She participated in the Tax Forum virtually
- Bowser participated in the Tax Forum and shared her experience during her time there. She thought the chat rooms were a very good set up
- Members were encouraged to participate in the Tax Forums

Internal Communications Committee

Bowser share the following updates from July:

- ICC considering making a change to their Facebook presence by eliminating the Facebook group and making it a page. The difference is the Facebook group covers internal format and internal resource for TAP. A Facebook page is more for public engagement. They will wait to make a final determination for the www.TAPSpace.org updates as it may solve this issue. The www.TAPSpace.org is updating its platform from 2006. The redesign project is to make it more modern, with more current technology
- Due to COVID-19 the mailing of the 2019 Annual Report has been provided in an electronic version. Members who need a copy were encouraged to let Bowser know and she will make sure to forward them a copy
- Articles for the Newsletter submissions are needed by August 22, 2020
- Member were encouraged to share any Outreach activities as soon as possible
- Bowser will share the Outreach from the Virtual Tax Forum with members

Action Items

Rosalia stated he will do the following action items:

- Rename **Project 40908** to **Improve Language CP515**
- **Project 43347, CP2000 Language** and **Project 40908 to Improve Language CP515**, have been approved to go to the Joint Committee contingent upon feedback from Systemic Advocate and the Attorney Advisor after Quality Review.
- Quality to send Matthew O'Sullivan with a cc to Rosalia by August 18, 2020.
- Add the July 08, 2020 Minutes for posting
- Will send out documents for Subcommittee 1 (assigned LT 3219C) and Subcommittee 2 (LT 3219A) for them to start the project work.

Roundtable

Jimerson reminded members to include in all emails

TaxpayerAdvocacyPanel@irs.gov for FACA record keeping purposes.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, September 9, 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.



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 8, 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 |
| • Bradford Folta Jr. | Gardiner, ME | Member |
| • Charles Jones | Green Cove Springs, FL | Member |
| • Michael Shamgochian | Petersham, MA | Member |
| • Kimberly Shepherd | Monroe, LA | Member |
| • Member | | |

Members Absent

- | | | |
|----------------------|----------------|--------|
| • Ronald Fitzherbert | Las Cruces, NM | Member |
| • Leonard Smith | Sherwood, AR | Member |
| • Barbara Snowden | West Haven, CT | Member |

Visiting Members

- | | | |
|-------------------|----------------------|----------------|
| • Phillip Kleiber | Roswell, GA | TAP Chair |
| • Robert Moretti | Great Falls, Montana | TAP Vice Chair |

Staff

- | | |
|----------------------|--------------------------|
| • Terrie English | TAP Director |
| • Robert Rosalia | Program Analyst |
| • Matthew O'Sullivan | Program Analyst |
| • Antonia Keeling | Program Analyst |
| • Tamikio Bohler | Wage & Investments |
| • Michael Odom | Wage & Investments |
| • 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.

National Office Report

Terrie English welcomed everyone on the call and stated:

- Tax Forums are starting on July 21, 2020 through August 20, 2020. Fred Smith, Outreach coordinator forwarded information through Email to each member. When IRS is not in sessions, booths will be set up for each organization to have input. There will be a chat room available to share experiences, information about TAP and receive issues. The Publication room will have documents available for downloading. Smith will be having a meeting to explain how to work the chat room. The Outreach committee will have information as well. Members were encouraged to join.
- Taxpayer First Act Office will be conducting a forum and the IRS has asked the Joint Committee to join them on July 16, 2020. They will be asking questions about individual experiences with IRS.
- Reminder to file Tax Returns by deadline of July 15, 2020
- TAP was mentioned in The General Report to Congress on pages 72 and 223. Members were encouraged to read over the Report
- Joint Committee monthly meeting is scheduled for July 23, 2020 and members are encouraged to join in on the call

Public Comments

None

Chair Report

Tracy Bunner welcomed everyone to the call.

Minutes Approval

NCC June 10, 2020 Minutes were approved.

Action Items

Robert Rosalia stated four completed projects were approved by the Joint Committee and forwarded on to the IRS. He is waiting for their responses.

Program Owner's Report

None

Subcommittee Reports

Subcommittee 1

Paul Berlage stated Subcommittee 1 and Subcommittee 2 worked on the same project on the CP2000 Notices. Rosalia sent the referral for:

Subcommittee 2

Charles Jones added Subcommittee 2 did the same as Subcommittee 1 and reviewed the language from Subcommittee 1 and added some additional language that was shared with the full committee.

- **Project #39806**, the product of both Subcommittees work was reviewed. Opened for discussion by Full Committee on ID #1860 of the project, Rosalia the recommendations to clarify the committee's determination.
- They anticipate the referral will be forward on today to the Joint Committee if approved.

Decision: Full Committee Consensus to forward Issue 39806 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).

Rosalia added the recommendation from Subcommittee 1 and Subcommittee 2 was forwarded to Systemic Advocacy and Attorney Advisor at the committee's request. The Quality Review team made up of Shepherd and Shamgochian will review and forward what they have to Berlage. He will forward the final copy to Rosalia by July 14, 2020.

TAP Annual Report

Bunner stated the responses for the paragraphs to be reviewed, have been completed and submitted. Bunner will complete the blurb for the CP 2000 so that it could be incorporated into the Newsletter and TAP Annual. This will be completed by July 22, 2020.

Screening Committee Report

Bunner stated Rosalia shared a copy of the Screening Report with members in the pre-reads. Five issues were transferred to other project committees and fifteen issues were dropped.

Discussion was held on the issues in the Parking Lot. It was decided the following issues would be worked:

40908 – Improve Notice Language of CP108; CP516/CP518 IMF; and CP515 IMF: assigned to Subcommittee 1

39747 – ITIN Rejection Notice-CP567: assigned to Subcommittee 2

Outreach Report

Felecia Dixon thanked members for getting their Activity Reports completed and turned in. Members were encouraged to reach out to their LTAs and let them know their availability to participate in virtual outreach. Members with ideas for possible Outreach were encouraged to share with the committee. Dixon is available for any questions.

Action Items

Rosalia stated:

- CP 2000 Notice approved to go to the Joint Committee contingent upon SA and AA feedback.
- The Quality Review team will have the final copy of the referral to Rosalia by July 14, 2020.
- Both Subcommittees are going to work on the CP 2000 paragraph language (Project ID number to be determined)
- Rosalia will send out project information for Subcommittee 1 to work project #40908 and Subcommittee 2 to work project #39747
- Screening Committee determinations will be finalized in the internal system and five issues transferred to their determined committees and fifteen dropped.



- Blurbs will be sent by Bunner to Leonard Smith and Shani Bowser on the CP 2000 for the Newsletter

Roundtable

Jimerson expressed appreciation to the Full Committee. Members were encouraged to continue to be safe.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, August 12, 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.



**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 Dixon | 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 Dixon 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 Foltz 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 Dixon 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.



**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 Dixon shared the following:

- Thank you expressed to members for turning in their Activity Reports
- Dixon 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
- Dixon 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.



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 8, 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 |
| • Michael Shamgochian | Petersham, MA | Member |
| • Kimberly Shepherd | Monroe, LA | Member |

Members Absent

- | | | |
|----------------------|------------------------|--------|
| • Ronald Fitzherbert | Las Cruces, NM | Member |
| • Bradford Foltz Jr. | Gardiner, ME | Member |
| • Charles Jones | Green Cove Springs, FL | Member |
| • Leonard Smith | Sherwood, AR | Member |
| • Barbara Snowden | West Haven, CT | Member |

Staff

- | | |
|----------------------|--------------------------|
| • Terrie English | TAP Director |
| • Robert Rosalia | Program Analyst |
| • Matthew O'Sullivan | Program Analyst |
| • Tamikio Bohler | Wage and Investment |
| • Cindy Jones | Wage and Investment |
| • Annie Gold | Administrative Assistant |

Roll Call

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. A review of the Agenda was shared.

- Outreach Committee will meet on April 09, 2020 beginning at 1:00 pm EST. The Lead for this committee is the TAP Vice Chair and is attended by all the Vice Chairs of the Project Committees
- Joint Committee scheduled meeting is on April 23, 2020 beginning at 1:30 pm EST. The call information has been posted on www.TAPSpace.org The TAP Chair, Project Committee Chairs will be attending. Members were encouraged to attend



- The Internal Communications Committee must be established. More information will be shared with the date and time

National Office Report

Terrie English welcomed everyone on the call and stated:

- Information is being received daily on the COVID-19. Members were advised to visit www.IRS.gov for the most current updates on COVID-19, Stimulus payments and the Extended Tax Filing date July 15, 2020.
- There is a scam going around individuals are going to residences stating they are from the Government offering masks. They ask the person who answers the door to try the mask on. The mask is laced with a chemical that will render unconsciousness. Then they enter and rob the residents. A word of caution was extended to members to be careful and informed family and friends. It is increasingly difficult to identify due to them wearing masks and gloves.
- Recruitment has been extended to April 20, 2020. Members were encouraged to do virtual Outreach to make individuals aware that TAP is still recruiting.

Comments from the public

None

Chair Report

Tracy Bunner informed the committee the March minutes will be approved during the next scheduled meeting in May.

Robert Rosalia shared the following action items:

- Project 40907 CP90 Notice response was received most of the responses stated:
Under Consideration—Follow-up Date: 04/30/2020
This change can be considered in conjunction with a project team looking at redesign of the notice.
- Committee agreed to wait for the follow up response before making a determination to accept the IRS responses.

Subcommittee Reports

Subcommittee 1

Paul Berlage stated Subcommittee 1 had their meeting on last week. They had a great response on **#42226** - Collection Letter LT16. All members participated and discussed their notes. The subcommittee will carry over work to their next meeting and it should be ready for next month's Project Committee meeting. Berlage added time is of the essence and feedback is needed. He is looking forward to working with the members.

Subcommittee 2

Members are continuing to work **#42225** - CP14. This issue requires a lot of work. There are some actions items that still need work completed. The project is being finalized and should be ready for next month Full Committee discussion.

Robert Rosalia added:

- Members were encouraged to look over the Annual Report. Gilbert Martinez will be sending a copy to each member. Members will be assigned to work on the committee.
- The Screening Report has time sensitive projects to be worked. Rosalia received two project proposals for Letters 17 and Letters 19. He shared them with Tamikio Bohler. There is a design team reviewing the letters for redesign. Background information will be provided to the committee.
- Discussions will be held with Jimerson on meeting the deadline.
- Subcommittee 1 assigned to work Letter 19
- Subcommittee 2 assigned to work Letter 17

Screening Committee Report

The Screening Committee will determine when to meet based on committee work and will discuss further in May.

Outreach Report

Felecia Dixon shared the following:

- An Email was shared with members on last week with updates
- The first Outreach meeting will be held on tomorrow April 09, 2020
- Members were encouraged to think of ways to move forward with different Outreach Activities
- Members encouraged to share News Release in their communities by utilizing the PSA (Public Service Announcements). Dixon stressed to not be afraid to reach out.
- Activity Reports are due every month on the 25th.
- The reports are extremely important. They help show how TAP is valuable and valid
- Members reminded to use the full date on the report in order for the total hours to be calculated
- Do not copy and paste. Information must be manually input on the report
- Members encouraged to reach out to LTAs for any activities they may have planned and try and participate as an Outreach event. Communicate with the LTAs the Stakeholder Liaisons and each other
- Rosalia talked with everyone about connecting with their LTA and, if need, will provide the LTA information with them.
- The Activity spreadsheet has a glitche in it but is being looked at
- The first meeting for the Newsletter has not been scheduled. There will be an invite sent to members in the next few days.



- Members are encouraged to submit articles or Outreach events to be included in the Newsletter

Action Items

Rosalia stated he will do the following action items:

- Update the system with Subcommittee 1 finishing work on Letter 16 and begin work on Letter 19.
- Update the system with Subcommittee 2 finishing work on Letter 17 and CP14 project.
- Send information for the Joint Committee's monthly meeting to the Full Committee
- Email members copy of the Activity Report User Guide

Jimerson added the TAP Staff is available to assist members when needed.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, May 13, 2020,
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 2:00 p.m. PT**

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



**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 Dixon | 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 Dixon discussed a recent virtual outreach they conducted together, and they shared the PowerPoint with the NCC committee for use. Bunner and Dixon 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.



**Notices and Correspondence Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 27, 2020**

Designated Federal Officer

- Terrie English TAP Director

Attendance

- | | | |
|----------------------|----------------|------------|
| • Shani Bowser | Harrisburg, PA | Member |
| • Tracy Bunner | Farr West, UT | Chair |
| • Felecia Dixon | Rolla, MO | Vice-Chair |
| • Bradford Folta Jr. | Gardiner, ME | Member |
| • Kimberly Shepherd | Monroe, LA | Member |
| • Leonard Smith | Sherwood, AR | Member |

Member Absent

- | | | |
|-----------------------|------------------------|--------|
| • Paul Berlage | Cincinnati, OH | Member |
| • Charles Jones | Green Cove Springs, FL | Member |
| • Ronald Fitzherbert | Las Cruces, NM | Member |
| • Michael Shamgochian | Petersham, MA | Member |
| • Barbara Snowden | West Haven, CT | 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

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 Dixon
- 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)- Dixon
- **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.