

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, March 30, 2022**

Designated Federal Officer

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-------------------------|------------------------|-----------------|
| • Shequeila Birdsong | Amherst, NY | Member |
| • Cheryl Crowe | Felton, DE | Member |
| • Kristin Gentile-White | Gilbert, AZ | Member |
| • Melissa Harvey | Hinton, WV | Member |
| • Steve Hoffman | Westford, MA | Member |
| • Charles Jones | Green Cove Springs, FL | Chair |
| • Will Keenan | Pikeville, KY | Member |
| • Shelly McCracken | Fountaintown, IN | Member |
| • T. Renee Parker | Brentwood, NY | Vice Chair |
| • Meagan Regina | Philadelphia, PA | Member |
| • Ying Sa | Des Moines, IA | Member |
| • Eugene Lillie | National Vice Chair | Visiting Member |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | TAP Administrative Assistant |
| • Terrie English | TAP Director |
| • Gilbert Martinez | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Tamikio Bohler | Program Analyst Wage and Investments (W&I) |
| • Aphillia "Lee" Hughes | Program Analyst W&I |
| • Gail Johnson | Program Analyst W&I |
| • Michael Odom | Program Analyst W&I |

Welcome/Announcements/Review Agenda

Cedric Jeans opened the meeting at 11:00am EDT, welcomed everyone back for the start of the TAP year. Jeans reviewed the agenda and how this meeting is expected to flow.

Roll Call/Self-Introductions

Quorum met. Everyone on the call introduced themselves and shared a little bit about themselves. The members were also encouraged to consider being part of the TAP leadership team.

Members of the Public

None

TAP Workflow/Meeting Procedures

Rosalia reviewed the workflow for TAP. Issues come from the public during outreach, the IRS directly, but the main contributor is from our website, www.improveirs.org. There is an area for the public to upload issues. Issue goes to the Screening Committee that determines whether the Project Committee should accept or reject the issue.

After a determination is made, it is moved from the Project Committee to its respective subcommittee. The Subcommittee is where the work on the referral is done. During this time, the committee comes up with recommendations to resolve the issue. If needed, a Subject Matter Experts (SME) can be called on to answer any questions. Once completed, the referral must be approved by the Project Committee. In order for the approval to be valid under the Federal Advisory Committee Act (FACA.) The meeting had to be listed in the Federal Registry Notice (Open to the Public) and meet Quorum (have half the membership plus one.)

Before the Referral can go to the IRS, it must also be approved by the Joint Committee (JC), the Governing TAP body. Additional tasks must take place before it can go to the JC for approval.

These steps include: Quality Review (QR) a review of grammatical errors; Systemic Advocacy (SA) and the Attorney Advisors (AA) that will make sure what we are suggestion is legal and fits within the National Taxpayer Advocates mission.

Once a referral is approved by the JC and elevated to the IRS, the IRS has 45 days to respond to our recommendations. The responses can be adopted, non-adopted, partially adopted or under consideration. Once we receive the responses, we can either accept them or rebut them. If a rebuttal is decided, the rebuttal is sent directly to the IRS, free from additional approvals. If the IRS does not change their position, the last option is to include the information in the TAP Annual Report.

English reminded the committee that we are asked to attend focus groups by the IRS, as we did last year so we should be prepared for that again. English also highlighted that TAP is the largest Federal Advisory Committee in Treasury, which carries a lot of weight since we get a lot of attention.

- **Ground Rules**

Please be respectful in how we operate and keep in mind it is ok to disagree, but we should be thoughtful in how we do it.

- **Telephone & E-Mail Etiquette**

When discussing TAP business, we need to Carbon Copy (CC) the TAP email address at: TaxpayerAdvocacyPanel@irs.gov. Our meetings are currently being held via WebEx for the visual portion, we have a conference line with an access code that is included in every meeting invite for the audio portion. Please try to arrive five minutes before each meeting. Please identify yourself so we know who is speaking and minimize sidebar conversations.

Use the mute button if you have to communicate outside of the meeting. There will be time where we have good recommendations that are not adopted. Don't let this discourage you from participating. When e-mailing others, be tactful in using the "Reply All".

- **Minutes/Minutes Approval**

Each committee will review prior meeting minutes and approve them at the Project Committee meeting.

- **Establish Quorum & Consensus**

Consensus will be needed for official approvals. This would mean that most of the attending members must agree. For the determination to be official, Quorum must be met. Quorum is half the committee total amount of members, plus one. For NCC we have 11 members, so the required number of members to make approvals will be 6.

- **Agenda & Pre-Read Information**

The pre-reads and the agenda will go out about a week before each meeting or as soon as possible to allow time for everyone to read the information.

- **Activity Reports/Time Reporting**

All TAP activities can be located on www.tapspace.org. As a "New Member" there will be a profile and a check sheet to complete on the site as a pop-up menu. www.improveirs.org is also a good place to review historical data on TAP.

- **Methods of Communication**

Phone calls, e-mails, and WebEx for now. When we change this, you will be notified.

TAP Leadership

Rosalia discussed the leadership with the committee and what being a leader means. Each committee has a Chair, Vice-Chair, Subcommittee Leads and Ad Hoc Committees. A good Chair keeps members engaged, represents the committee on the JC meeting and works with everyone to get the committee's work done. The Vice-Chair backs up the Chair and is the lead on Outreach.

Nominations and Election Process (Chair/Vice-Chair)

- Nominate Candidates
Jones self-nominated
 - Self-Introductions/Bios
Parker self-nominated
 - Voting
- Both of the nominees are unopposed with no objections.

Charles Jones is the committee Chair
Renee Parker is the committee Vice Chair

Break Election Results

Minutes Approval

November 10, 2021. Jones motioned; Parker seconded.

Action: minutes approved as submitted.

Establishment of Subcommittees and Meeting Dates

Monthly committee meeting second Tuesday at 12:00pm EST

- **Subcommittee 1**
Birdsong, Harvey, Hoffman, Jones, Parker, Sa.
First Tuesday at 11am EST
- **Subcommittee 2**
Crowe, Gentile-White, Keenan, McCracken, and Regina
First Tuesday at 1pm EST
- **Outreach (Vice-Chair)**
Renee Parker
- **Screening Members**
Charles Jones, Ying Sa, Kristin Gentile-White
- **Quality (QR)**
Meagan Regina, Will Keenan
- **Internal Communications**
Will Keenan

Review of IRS 2021 Responses

- **39806** – CP2000 (Follow-up 12-30-2021)
- **43347** – CP2000 Paragraph Language (Follow-up 12-30-2021)
- **48460** – Legitimacy of Phone Numbers
- **48326** – Adding information to IRS “View Account”

- **51423**- CP504 and CP504B Phone Number
- **43860** – Transcripts (Add Page Numbers)

Rosalia reviewed how the referrals look and will go into more detail during the next meeting.

Action Items

Rosalia will complete the following:

- Send out the Pre-Reads for next weeks meetings

Meeting Wrap-Up

Jones thanked the committee for allowing him to be the Chair and is looking forward to this year. Parker added that they are here to assist in any way to get through this year.

Closing

Jeans officially closed the meeting 1:50pm ET.

Next Meeting: Tuesday, April 12, 2022, at 12:00pm EST

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