

**Notices and Correspondence Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, February 9, 2021**

**Designated Federal Officer**

- Terrie English                      TAP Director

**Attendance**

- |                       |                        |            |
|-----------------------|------------------------|------------|
| • Paul Berlage        | Cincinnati, OH         | Member     |
| • Felecia Dixson      | Rolla, MO              | Vice Chair |
| • Ronald Fitzherbert  | Las Cruces, NM         | Member     |
| • Terrill Flakes      | Atlanta, GA            | Member     |
| • Bradford Folta, Jr. | Baxter, MN             | Chair      |
| • Charles Jones       | Green Cove Springs, FL | Member     |
| • Renee Parker        | Brentwood, NY          | Member     |
| • Richard Metzler     | Las Vegas, NV          | Member     |

**Visiting Member**

- |               |                  |                |
|---------------|------------------|----------------|
| • Bob Moretti | Great Falls, MT  | TAP Chair      |
| • Nina Tross  | Apollo Beach, FL | TAP Vice Chair |

**Members Absent**

- |                     |                |        |
|---------------------|----------------|--------|
| • Shani Bowser      | Harrisburg, PA | Member |
| • Kimberly Shepherd | Monroe, LA     | Member |
| • Leonard Smith     | Sherwood, AR   | Member |

**Staff**

- |                      |                                                          |
|----------------------|----------------------------------------------------------|
| • Robert Rosalia     | TAP Program Analyst                                      |
| • Matthew O'Sullivan | TAP Program Analyst                                      |
| • Rosalind Matherne  | TAP Program Analyst                                      |
| • Annie Gold         | TAP Administrative Assistant                             |
| • Michael Odom       | Wage and Investment (W&I)                                |
| • Dale Hawkins       | W&I, Operations Support                                  |
| • Leslie Henley      | W&I, Customer Assistance Relationship & Education (CARE) |
| • Jason Della-Sala   | W&I-CARE                                                 |
| • Stephen Bronson    | W&I-CARE                                                 |

## **Roll Call**

Quorum was met.

## **Members of the Public**

None

## **Welcome**

Terrie English opened the meeting and welcomed everyone to the call. She shared an overview of the Agenda.

## **Members and Staff Introductions**

Robert Rosalia opened the floor for introductions. Each member and staff provided information about themselves.

## **TAP Meeting Procedures**

Rosalia shared the following:

### **Ground Rules**

- Ideas and Opinions are encouraged and valued
- Listen and allow each member to speak and be heard
- Time - Be respectful of each other's time and be punctual for meetings.  
Please let the Chair and Analyst know if you're not able to attend meetings

### **Methods of Communications**

- Emails
  - Send a copy of all project-related work to the [Taxpayeradvocacypanel@irs.gov](mailto:Taxpayeradvocacypanel@irs.gov)
- Telephone
- Fax
- WebEx
- Do not get discouraged if the responses received are not what you expected
- Do not "reply to all" or copy everyone unless it is necessary
- Always be considerate of others' time and feelings

### **Meetings**

- Agendas are shared with the Chair, Analyst and Designated Federal Officer (DFO) and then with the committee members. The Analyst will draft the Agendas and discuss it with the Chair and DFO for approval before it's distributed to the committee members.

- Pre-reads are shared prior to meetings and should be reviewed before the meetings
- Useful tools to research issues and for document retrieval can be found at: [www.TAPSpace.org](http://www.TAPSpace.org), [www.Improveirs.org](http://www.Improveirs.org) and [www.IRS.gov](http://www.IRS.gov)

Quorum must be met (50% of the committee members plus 1) to make decisions and approve documents

- Full Committee meetings are subject to Quorum whereas Subcommittee and Screening Committee meetings are not

### **WebEx**

- Visual portion
- Meetings held via conference calls
- Able to share documents

### **So, You Want to Be A Chair**

Rosalia shared a presentation outlining the Committee Chair and Vice Chair position descriptions with their duties and responsibilities:

- The Chair is elected by the committee members
- Bob Moretti is the current TAP Chair. His duties include being the spokesperson for TAP and point of contact for the Joint Committee
- Nina Tross is the current TAP Vice Chair. She chairs the TAP Outreach Committee

### **Committee Election Results**

Bradford Folta self-nominated and ran unopposed for the Chair of Notices and Correspondence Committee (NCC) position. Bradford accepted the position as NCC Chair.

- Felecia Dixson self-nominated and ran unopposed for the Notices and Correspondence Committee Vice Chair position. Felecia accepted the position as Vice Chair of NCC.

### **Minutes Approval**

November 12, 2020 NCC Minutes approved with corrections.

### **Committee Collateral Duties and Assignments**

**Screening Committee:** Charles Jones (Lead), Ronald Fitzherbert and Felecia Dixon

**Quality Review (QR) Team:** Richard Metzler (Lead), Renee Parker and Terrill Flakes

**Internal Communications Committee (ICC):** Paul Berlage (Lead) and Leonard Smith. Bradford Folta will back-up Leonard Smith if needed.

**Outreach Committee –** Dixon

**Subcommittee 1:** Berlage (Lead), Dixon, Fitzherbert, Parker and Leonard Smith

Meeting dates will be the first Tuesday of each month at 1:00 PM EST

**Subcommittee 2:** Jones (Lead), Bowser, Folta, Metzler, Kimberly Shepherd and Flakes

Meeting dates will be the first Wednesday of each month at 1:00 PM EST

NCC Full Committee meeting dates will be the second Wednesday of each month at 1:00 PM EST

### **Committee Project Work**

Stephen Bronson from W&I shared information relative to Tax product reviews and introduced the Notice 1445 Tax Help in Other Languages. Both Subcommittee 1 and 2 will work the issues under the following ID:

- ID #44244 – Notice 1445

### **IRS Responses**

Rosalia provided updates for the following Issues:

- ID #42225, CP14 – Assigned to Subcommittee 2 for further review
- ID #42425, LT19 – Assigned to Subcommittee 2
- ID #42226, LT16 – Committee Closing Project
- ID #42413, LT17 – Committee Closing Project
- ID #43573, LT3219C – Assigned to Subcommittee 1
- ID #39747, ITIN Rejection Notice CP567 – Assigned to Subcommittee 1
- ID #43678, LT 5071C & LT 4883C – Assigned to Subcommittee 1
- ID #40117, Letter 2645C - Committee Closing Project



**Decision: Full Committee Consensus to close Project # 42425, 42226, 42413,40117 and assigned Project # 42225, 43573,39747, 43678, N1445, 44244 to Subcommittees 1 and 2.**

**Closing**

English officially closed the meeting.

**Next Meeting: Wednesday, March 10, 2021  
1:00 pm EST, 12:00 pm CST 11:00 am MST, 2:00 pm PST**

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