

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 14, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

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

Members Absent

- | | | |
|---------------------|---------------|--------|
| • Terrill Flakes | Atlanta, GA | Member |
| • Richard Metzler | Las Vegas, NV | Member |
| • Kimberly Shepherd | Monroe, LA | Member |

Staff

- | | |
|----------------------|----------------------------------|
| • Terrie English | TAP Director |
| • Robert Rosalia | TAP Management & Program Analyst |
| • Matthew O'Sullivan | TAP Management & Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage and Investment (W&I) |
| • Cindy Jones | W&I |

Roll Call

Quorum was met.

Members of the Public

None

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call and provided an overview of the Agenda.

National Office Report

Terrie English welcomed everyone to the call.

- TAP Recruitment period has begun. Interested individuals can complete an application on www.USAJOB.S.gov. Members were encouraged to share the information with all interested persons. This would be a good

opportunity for Outreach hours. The open period will continue until May 14, 2021

- The Joint Committee will have their monthly meeting on April 22, 2021 beginning at 1:30 PM, EDT. Members were encouraged to attend and hear the process.
- TAP will hold their Quarterly meeting scheduled June 17, 2021 beginning at 1:00 PM, EDT. There will be training provided during the meeting and it is not opened to the public. Members were encouraged to attend.

DFO Report

Jimerson provided the following information:

- Members were encouraged to complete their updated profile on www.TAPSpace.org If there should be questions or comments the TAP Staff is available to assist. Updates are being conducted on a continual basis and we are looking for feedback.
- Internal Communications Committee will have their monthly meeting on April 21, 2021 beginning at 12:00 PM, EDT. Members will work on the Newsletter, Facebook page and TAPSpace projects
- The Outreach Committee will have their monthly meeting April 21, 2021 at 2:00 PM, EDT. The committee is lead by TAP Vice Chair, Nina Tross and attended by the Vice Chairs of each project committee and ICC
- The Mentorship Program is scheduled for the last week of the month. The date and time will be forwarded to members. Rosalind Matherne is the Analyst assigned to oversight. Calendar invites will be sent to each member

Chair Report

Bradford Folta welcomed members to the call and thanked the members for their hard work and dedication. During the welcoming, a question was asked if a third-year member could reapply to TAP. English responded by informing the Committee third year members must wait three years to reapply. They can sit in on meetings as a public attendee. They are encouraged to come back as a mentor for the new members coming aboard during their first few months. Folta, encouraged members in their third year to consider being a mentor.

Minutes Approval

March 10, 2021 NCC Minutes were approved as submitted.
Folta moved and Felicia Dixson seconded

Action Items Summary

- Folta added the Joint Committee commented on ID #44244 - Notice 1445 (N1445) language used in the referral. It was elevated to IRS for consideration with the recommendations

Program Owner Report

No Report

Subcommittee 1

Paul Berlage shared the following updates for Subcommittee 1:

- Project **#43843 – LT2645C** was an issue submitted by the Taxpayer losing contact with IRS due to missing refund. Their recommendation was to add language if not heard back to contact the Local Taxpayer Advocate office. The issue was moved to Systemic Advocacy and the Attorney Advisors. Rosalia added, the Attorney Advisor commented to add a couple words to address the eligibility for TAS. Subcommittee decided to alter the recommendation based on the feedback and move forward to the Joint Committee after Quality Review.

Berlage motioned and Dixson seconded

Decision: Full Committee Consensus to forward to Joint Committee after QR.

- Subcommittee 1 completed working on project **#43687 - LT5071C & LT4883C** Rebuttal for ID #1991,1997 & 1998 and it was sent to the IRS through the JC analysts
- They are still working on the New Issue related to **#43944 - LT5071C & LT4883C**

Subcommittee 2

Charles Jones stated the following:

- **Project #43572 3219A** will be rebutted they added some additional language with justification for the rebuttal and it was sent to the IRS through the JC analysts
- **Project #44237 - CP504 and CP504B** are still being reviewed and will continue working on the recommendations.

2021 TAP Annual Report

Rosalia stated project **#43843 – 2645C** was completed. A volunteer is needed to write the blurb for the Newsletter by twenty-fifth of the month. Parker volunteered to do the blurb. Berlage will back her up and complete the newsletter for the ICC.

Screening Committee

Rosalia informed the Screening Committee did not have a meeting last month and will look to have a meeting in the upcoming weeks.

Outreach

Dixson stated members were doing well with getting the Activity reports in.

- Encouragement to members to continue to push for Outreach activities
- Dixson mentioned she had participated in an Outreach event reaching one hundred sixteen people on Saturday, April 10, 2021
- She gave appreciation to members for a job well done and submitting the reports timely

Internal Communications (ICC)

Berlage stated the ICC had their first meeting on last month.

- They elected their Chair and Vice Chair
- He was elected the Vice Chair of the ICC
- They had volunteers to take on the Administrator position for Facebook. They are looking into other social media outlets
- Worked on editing numerous blurbs that were submitted on last month.

Action Items

Rosalia stated the following:

- Approved March 10, 2021 Minutes were approved
- **#43572 – LT3219A** and **#43678 – LT5071C & LT4883C** rebuttal will be sent to the Joint analyst to be forwarded on to the IRS
- **#43843 - LT2645C** was approved to be forwarded to the Joint Committee after Parker completes QR by the weekend
- Subcommittee 1 will continuing work on new recommendations for project **#43944 - LT5071C and LT4883C**
- Subcommittee will continuing work on project **#44237 - CP504 and CP504B**

Roundtable

- Parker will reach out for feedback if needed while working on the blurbs
- Jimerson expressed thank you to everyone for their participation. A special thank you to IRS Mike Odom and Cindy Jones for their joining in on the calls, answering questions regarding referrals being worked on and being a valued part of the meeting.
- Members of the public who may have been listening in, thank you and your input is important to improving customer service when it comes to Notices and Correspondences

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, May 12, 2021,
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.