

**Notices and Correspondence Committee (NCC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, May 12, 2021**

**Designated Federal Officer**

- Cedric Jeans TAP East Chief

**Attendance**

- |                      |                        |            |
|----------------------|------------------------|------------|
| • Paul Berlage       | Cincinnati, OH         | Member     |
| • Felecia Dixson     | Rolla, MO              | Vice Chair |
| • Ronald Fitzherbert | Las Cruces, NM         | Member     |
| • Terrill Flakes     | Atlanta, GA            | Member     |
| • Charles Jones      | Green Cove Springs, FL | Member     |
| • Richard Metzler    | Las Vegas, NV          | Member     |
| • Renee Parker       | Brentwood, NY          | Member     |
| • Kimberly Shepherd  | Monroe, LA             | Member     |

**Members Absent**

- Bradford Folta, Jr. Baxter, MN Chair

**Staff**

- |                          |   |
|--------------------------|---|
| • Terrie English         | TAP Director  |
| • Robert Rosalia         | TAP Management & Program Analyst                          |
| • Antoinette "Toni" Ross | TAP Management & Program Analyst                          |
| • Annie Gold             | TAP Administrative Assistant                              |
| • Michael Odom           | Wage and Investment (W&I)                                 |
| • Cindy Jones            | Supervisor W&I  |
| • Dale Hawkins           | Tax Analyst W&I   |
| • Catherine Sykes        | Treasury Inspector General for Tax Administration (TIGTA) |

**Roll Call**

Quorum was met.

**Members of the Public**

None

**Welcome**

Cedric Jeans opened the meeting at 1:00pm ET and welcomed everyone to the call.

### **National Office Report**

Terrie English welcomed everyone to the call.

- File your returns by May 17, 2021.
- TAP and TAS will be having a focus group for underserved Native Americans and are welcomed to join.
- There is a request for panel members who serve or have served in the military for a focus group.
- Joint Committee meeting will be held May 27, 2021 1:30pm ET.
- All TAP Quarterly meeting will be held June 17, 2021 via Zoom 1:00pm ET.
- Tax Forum preparation has started, volunteers are being solicited.
- Badges were sent out, contact your analyst if you have not been received yours.
- Business cards are going out, but there were delays with half of the list.

### **DFO Report**

Jeans provided the following information:

- The recruitment period has been extended until June 1, 2021.
- IRS is sending news releases about tax changes. Subscribe at [www.irs.gov](http://www.irs.gov) to receive them and stay informed with regard issues we are covering.

### **Chair Report**

Dixson welcomed everyone to the meeting.

### **Minutes Approval**

April 14, 2021 NCC Minutes. Berlage motioned; Fitzherbert seconded.

**Action: Minutes approved as submitted**

### **IRS Responses Received**

Rosalia reported receiving a response for Issue **43843** – LT2645C Interim Letter. This issue will be rebutted by subcommittee 1.

### **Subcommittee 1**

Paul Berlage shared the following updates for Subcommittee 1:

A Subject Matter Expert (SME) helped provide clarification to the role of the phone representatives relating to Power of Attorneys. The committee is still working what appears to be operator error to improve these behaviors in Issue **43944** - LT5071C & LT4883C Potential ID During Processing. For Issue **43843** - LT2645C Interim Letter, TAS asked that we only include their website and not their phone number and they will complete a rebuttal on the issue.

### **Subcommittee 2**

Charles Jones stated the following:

Issue **44237** – CP504 and CP504B Notice of Intent is still being discussed as the committee reviews the style guide. Jones reported doing preliminary working on Issue **49524** – LT3541 Disallowance of Alimony & LT3541A Verification Deductions. He requested that the project proposal be accepted. They found an issue they wanted to expedite to the IRS on the LT3541A, since it was missing an instructional paragraph in full. He stated that even though the committee is not done with reviewing the letters for recommendations, They would like approval to send the recommendation to the IRS. Dixon motioned; Jones seconded.

**Action: Project 49524 – LT3541 Disallowance of Alimony & LT3541A, proposal accepted and recommendation approved to elevate to JC after Quality Review**

### **2021 TAP Annual Report**

Dixon reported the committee is up to date on our tasks right now and don't have any current entries to secure.

### **Screening Committee**

Jones reported sending as part of the pre-read one of the issues that the screening committee had in inventory. He suggested that the project proposal be approved and issue **49629** – CP161 Notice of unpaid taxes, be worked by one of the subcommittees. Felicia Dixon agreed, approved the proposal, and assigned the issue to be worked into a project by subcommittee 1.

### **Outreach**

Dixon gave members options for doing outreach:

- Dixon encouraged to members to continue to push for Outreach activities
- Use social media to talk to people about making a difference and express they do not have to be working practitioners to join TAP.
- Reach out to your Local Taxpayer Advocates (LTAs) for outreach possibilities.
- Reach out to Stakeholder Liaison is an option for outreach possibilities.
- Join the Tax Forum for outreach hours also.
- English encouraged doing this early before spaces are taken for the tax forums.

Berlage started checking social media in the mornings to see what can be shared to get some outreach in every day.

### **Internal Communications (ICC)**

Berlage stated:

- The member guide is being worked for [www.TapSpace.org](http://www.TapSpace.org) by the ICC. We are requesting feedback from everyone using it, especially from those who used the old system.
- We are also checking to see if the guide is addressing these issues. Email Berlage your feedback.

- Berlage will write about Subcommittee 1 and Jones for Subcommittee 2 for the newsletter report by May 22, 2021.

### **Action Items**

Rosalia stated the following:

- Newsletter to be produced by Jones and Berlage.
- CP 161 project proposal accepted for subcommittee 1.
- Project proposal accepted for CP3541, CP3541A
- Subcommittee 1 working rebuttal for issue 43843 - LT2645C
- Subcommittee 1 working on issue 43678 - LT5071C and LT 4883C
- Subcommittee 2 working issue 44237- CP504 and CP504B
- Subcommittee 2 working issue 49524 - LT3541 and 3541A
- Project 49524 (recommendation on 3541A) elevated to JC after Quality Review
- Sub. 1 and Sub. 2 reviewing member guide for [www.tapspace.org](http://www.tapspace.org)
- April 14, 2021 minutes to be submitted for posting.

### **Roundtable**

Dixon thanked everyone for participating in today's meeting.

### **Closing**

Jeans officially closed the meeting 1:39 pm ET.

**Next Meeting: Wednesday, June 9, 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.**