

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, October 13, 2021**

Designated Federal Officer

- Robert Rosalia TAP Management & Program Analyst

Attendance

- 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

Members Absent

- Paul Berlage Cincinnati, OH Member
- Terrill Flakes Atlanta, GA Member
- Richard Metzler Las Vegas, NV Member
- Kimberly Shepherd Monroe, LA Member
- T. Renee Parker Brentwood, NY Member

Staff

- Kevin Brown TAP Administrative Assistant
- Terrie English TAP Director
- Fred Smith TAP Management & Program Analyst
- Tamikio Bohler Wage and Investments (W&I)

Roll Call

Quorum was not met.

Members of the Public

None

Welcome

Robert Rosalia opened the meeting at 1:00pm ET. Folta welcomed everyone.

National Office Report

English gave condolences for the family loss. English spoke about the graduation ceremony plans for the third-year members. This is still being planned for some time in November; more information will be forthcoming. English spoke about the homeless and W&I focus groups that had to be rescheduled. New dates will go out very soon.

English spoke about how much TAP has been wanted and utilized this year. Other Federal Advisory Committees inquired about how TAP is running some of the things we are doing so they can learn from us.

DFO Report

Rosalia asked for members to assist Brock with the TAP Annual Report to Congress write ups, proofreading and editing. Rosalia reminded the returning members to continue doing outreach after the TAP year end in November. Rosalia asked members to share any outreach events that can be repeated so they can be added to the outreach data base for future TAP members in the years to come.

The National Taxpayer Advocate (NTA) and Systemic Advocacy (SA) spoke about Most Serious Problems (MSPs) how TAP could assist them with issues. They may reach out to us for focus groups and Ad Hoc committees in the very near future. Yesterday we had the Chair and Vice Chair info session for TAP leadership for next year. Nominations are due on October 19, 2021.

The TAP Chair and Vice-Chair information session is at 3:00pm ET today for those interested in TAP leadership. October 19, 2021 is the last day for nominations.

Charles Jones volunteered to assist with the Annual Report. English added that graduating members can help in next year's mentoring of the new TAP members.

Committee News & Updates

Minutes Approval

September 9, 2021 NCC Minutes. All present members agree with minutes but will be tabled until next month for official approval due to quorum.

IRS Responses:

- **49629** – CP161 Notice of unpaid taxes
Tabled until next month for official approval due to quorum

Subcommittee

Dixson shared the following updates for

- **48326** – Adding information to IRS “View Account”

All present members agree with the recommendations but will be tabled until next month for official approval due to quorum.

- **48460** – Legitimacy of Phone Numbers-

Jones spoke about the assurance of security we can get from the public with this referral. Rosalia reported the Systemic Advocacy approved this, but we are

waiting for Attorney Advisors review. All present members agree with the recommendations but will be tabled until next month for official approval due to quorum.

2021 TAP Annual Report

Folta reported the committee is up to date on our tasks right now for the Annual Report. He will start putting a draft together based on the blurbs that have been collected and it will be shared with the committee.

Screening Committee

Jones reported the new issue **50322** – LT6330C currently in the parking lot. All other issues dropped

Parking Lot:

- **43860** – Transcripts (Add Page Numbers)
- **43843** – LT2645C Interim Letter (Rebuttal)
- **50322** - LT6330C (Compare 4883C)

Issues in the parking lot to be worked on by the subcommittee for next month's meeting with the addition of:

- **44237** - CP504 and CP504B (New referral)

Outreach

Dixson reported still having issues getting outreach done. Veteran groups and community events are a big source of outreach opportunities per Dixson. Dixson and English encouraged members to find or create an Outreach event.

Internal Communications (ICC)

Rosalia inquired about completing an article for the newsletter and secured a date to finalize it.

Action Items

Rosalia stated the following:

- Rosalia notated the committee's disposition on issues for next month's meeting. The following to be tabled for official approval:
- **48326** – Adding information to IRS "View Account"
- **48460** – Legitimacy of Phone Numbers
- September 9, 2021 NCC Minutes
- **49629** – CP161 Notice of unpaid taxes



Chair Closing & Roundtable

Folta thanked everyone for attending the meeting.

Closing

Rosalia officially closed the meeting 1:54pm ET.

**Next Meeting: Wednesday, November 10, 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.