

**Notices and Correspondence Committee (NCC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, September 8, 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     |
| • Bradford Folta, Jr.  | Baxter, MN             | Chair      |
| • Charles Jones        | Green Cove Springs, FL | Member     |
| • Richard Metzler      | Las Vegas, NV          | Member     |
| • Kimberly Shepherd    | Monroe, LA             | Member     |
| • Robert "Bob" Moretti | National Chair         | Visitor    |

**Members Absent**

- T. Renee Parker Brentwood, NY Member

**Staff**

- Kevin Brown TAP Administrative Assistant
- Robert Rosalia TAP Management & Program Analyst
- Antoinette Ross TAP Management & Program Analyst
- Fred Smith TAP Management & Program Analyst
- James Bellinger Wage and Investments (W&I)

**Roll Call**

Quorum was met.

**Members of the Public**

None

**Welcome**

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

**National Office Report/ DFO Report**

Jeans reported during the Joint Committee (JC) Planning session meeting, they discussed challenges each committee had, and an action plan will be developed to address them. One item discussed was using the current Activity Report spreadsheet. TAP is in the process of incorporating this function into the [www.tapspace.org](http://www.tapspace.org) site.

Other challenges included sharing more examples of outreach, which will be added to the [www.tapspace.org](http://www.tapspace.org) for members use freely. We are looking to give more training for Chairs and Vice chairs to better prepare them. The National Chair/Vice-chair election process for TAP starts this month. We are encouraging returning members to participate. Folta encouraged committee members to seek leadership roles for next year.

## **Committee News & Updates**

### **Minutes Approval**

August 11, 2021 NCC Minutes. Dixon motioned; Fitzherbert seconded.

**Action: Minutes approved as submitted**

### **IRS Responses Received**

- **40117 - L2645C Interim Letter**

This project will be re-evaluated in the November subcommittee call

- **49524 – LT3541 Disallowance of Alimony (for Oct. Sub. call)**

Committee will hold off on deciding on the project until after the Subject Matter Expert (SME) discuss formatting and bolding limitations as it pertains to the recommendations.

- **43678 – LT5071C & LT4883C (Rebuttal)- Partial Adopted**

The committee discussed the responses from the IRS and were pleased to see that the IRS will incorporate additional ways to verify Power of Attorney's (POA). Folta suggested calling in as a POA rep and see exactly what procedures they use to authenticate once the date of implementation has passed.

**Action: Response accepted – Project Closed**

- **44237 - CP504 and CP504B- Non-Adopted**

The committee will review the new version of these letters. The issue will remain open until this research is completed. Rosalia will send out documentation to be reviewed as pre-reads before the next meeting.

### **Awaiting IRS Response**

- **39806 – CP2000 (Follow-up 9-30-2021)**
- **43347 – CP2000 Paragraph Language (Follow-up 9-30-2021)**
- **49629 – CP161 Notice of unpaid taxes**

### **Subcommittee**

Paul Berlage shared the following updates for

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

This issue is still being worked on. Recommendations are near complete and it should be ready for approval next meeting.

- **48460 – Legitimacy of Phone Numbers**

Jones reported this issue is still being worked. Similar to the project above, many of the recommendations are complete, we need to have members finalize them. Recommendations were assigned to each member and we anticipate finishing the project soon.

### **Screening Committee**

Jones reported that a new issue on the LT6330C has been added to the parking lot. All other issues dropped. Committee agreed with the determinations and the internal systems will be updated accordingly.

#### **Parking Lot:**

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

### **Outreach**

Dixson reported outreach being a struggle. We have four reports turned in for the last two months. Please turn in your activity reports as they show our validity as a program to the IRS. Jones indicated that virtual opportunities for outreach are a much better approach given the current times. Dixson reported contacting the Local Taxpayer Advocate (LTA) is a good option for opportunities. Dixson encouraged members to record any and all outreach they conduct in their reports.

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

Berlage reported having issues with last month's newsletter. September 30, 2021 is the deadline for the Facebook group to be closed. Berlage asked the committee to go to the page and like it. There is a link to the page on the old group.

### **Chair Closing & Roundtable**

Folta thanked everyone for attending the meeting.

### **Closing**

Jeans officially closed the meeting 1:59pm ET.

**Next Meeting: Wednesday, September 8, 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.**