

**Notices and Correspondence Committee (NCC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, November 10, 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 |
| • T. Renee Parker | Brentwood, NY | Member |

Members Absent

- | | | |
|---------------------|---------------|--------|
| • Richard Metzler | Las Vegas, NV | Member |
| • Kimberly Shepherd | Monroe, LA | Member |

Staff

- | | |
|--------------------------|----------------------------------|
| • Kevin Brown | TAP Administrative Assistant |
| • Terrie English | TAP Director |
| • Robert Rosalia | TAP Management & Program Analyst |
| • Antoinette "Toni" Ross | TAP Analyst |
| • James Bellinger | Wage and Investments (W&I) |
| • Cynthia "Cindy" Jones | W&I Supervisor |

Roll Call

Quorum met.

Members of the Public

None

Welcome

Cedric Jeans opened the meeting at 1:00pm ET. Folta welcomed everyone. Folta gave special thanks to the third-year members on the committee: Dixson, Berlage, Fitzherbert, Flakes, and himself.

National Office Report

English thanked and wished a Happy Veteran's Day to all who served the country including their families. English thanked all who served on the TAP for all of the work they did and reminded everyone of the graduation ceremony on

November 19, 2021, for the third-year members. All are welcome to attend and share thanks to them before they leave. Send any messages to Rosalia for this. English reminded everyone that the Joint Committee (JC) will be meeting on November 18, 2021, at 1:30pm. You can sit in on this as it is part of your activity report as TAP duty. The results of the TAP leadership are being tallied and a report of who will be the next national Chair and Vice-Chair will be out very soon.

DFO Report

Jeans thanked everyone especially those retiring. You can put a feather in your hat about all the accomplishments you have achieved through referrals. We hope to reconvene around February 2022. Feel free to attend the new member orientation as a refresher. Presidential ceremony, for graduating members, where all of your hours from these three years are added up to see which award you qualify for. Jeans also thanked the IRS partners for answering questions on tough topics and all the support.

Committee News & Updates

Minutes Approval

September 9, 2021 NCC Minutes. Dixon motioned; Jones seconded
October 14, 2021. Fitzherbert motioned; Dixon seconded.

Action: minutes approved as submitted.

IRS Responses Received:

- **49524** – LT3541 Disallowance of Alimony
- **44237** – CP504 and CP504B
- **49629** – CP161 Notice of unpaid taxes (Accept IRS Response- Close)
- **43843** - L2645C Interim Letter (TAS number) (Rebuttal)

Dixon motioned; Jones seconded to accept and close all responses.

Awaiting IRS Response

- **39806** – CP2000 (Follow-up 12-30-2021)
- **43347** – CP2000 Paragraph Language (Follow-up 12-30-2021)

IRS is hoping to have final response by the end of the year according to Jeans. The retired members will receive a copy of the response when received.

Program Owner Report

N/A

Subcommittee

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

Dixon motioned; Fitzherbert seconded.

Action: Issue elevate to JC for consideration pending Quality Review (QR).

- **48460** – Legitimacy of Phone Numbers

Jones spoke about the assurance of security we can get to the public with the acceptance of these recommendations. Dixon motioned; Jones seconded.

Action. Issue elevated to JC for consideration.

New Projects

- **51423-** CP504 and CP504B Phone Number (New referral)

Dixon motioned; Fitzherbert seconded.

Action: Issue elevate to JC for consideration pending Quality Review (QR).

- **43860** – Transcripts (Add Page Numbers)

Jones motioned; Fitzherbert seconded.

Action: Issue elevate to JC for consideration pending Quality Review (QR).

- **50322** - LT6330C (Compare 4883C)

This issue will be tabled to the next TAP year.

2021 TAP Annual Report

Blurbs Assigned:

- **51423-** CP504 and CP504B Phone Number (New referral) (BF)
- **43860** – Transcripts (Add Page Numbers) (CJ)
- **49629** – CP161 Notice of unpaid taxes (BF)
- **48460** – Legitimacy of Phone Numbers (CJ)
- **48326** – Adding information to IRS “View Account” (PB/FD)

Screening Committee

Rosalia reported eight or nine issues to be reviewed. Dixon will send a response for her review to Rosalia to be shared with the screening committee.

Outreach

Dixon spoke about activity reports needed as soon as possible from retiring members. It is best for them to forecast the report and turn it into the staff.

Reports are coming in pretty well, but we are still waiting for two. Dixon reported doing some interesting outreach in her hometown for international woman-owned businesses for outreach. Dixon asked committee to take little opportunities to speak about TAP and it could make a big difference. Dixon spoke of having a great time on the committee.

Internal Communications (ICC)

Berlage spoke about the benefits to being on TAP and how it has caused him to learn about new things like WebEx, Zoom and even to speak to people publicly. The committee has made it fun for me. Berlage will accept input from the committee for the newsletter report by November 22, 2021.

Action Items

Rosalia stated the following:

- September and October minutes.
- Issues elevated to JC- **48326; 48460; 51423; and 43860.**
- The committee will close issues: **49524; 44237; 49629; and 43843.**
- Newsletter to be worked by Berlage and Folta.

Chair Closing & Roundtable

Rosalia sent a special thanks to the retiring members. English spoke about how much she enjoyed this committee making these issues easy because of their great attitude.

Folta thanked everyone for a great year and how the committee has worked together. We appreciate all the participation from everyone this year. Jeans thanked Folta for the humor he brought to the committee, that made this along with Dixson a very good year. Returning members will get information in the next few weeks. We hope to be traveling next year and enjoy the rest of the year.

Closing

Jeans officially closed the meeting 1:50pm ET.

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

Next Meeting: TBD