



**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
April 28, 2011**

Designated Federal Official

Shawn Collins TAP Director

Members Present

Thomas (Tom) Walker	TAP Chair
John Kim	TAP Vice Chair
Gerald (Jerry) Stepner	Chair, Area 1
David Cain	Chair, Area 2
Ken Donnelly	Chair, Area 5
Patricia (Patti) O'Neill	Chair, Area 7
Mary Jean Potenzzone	Chair, SBSE-Practitioners Experience
Harlan Barnett	Chair, SBSE-Toll Free
Ernest Miller	Chair, Notices
Donald Thomas	Chair, Forms and Pubs
Stephen Vanderver	Chair, VITA
Susan DaCorte	Chair, Communications
Erica Webber	Chair, EITC
Sue Tatum	Vice Chair, EITC
Mary Jo Werner	Chair, Area 4

Members Absent

Anne Rasmussen	Chair, Area 6
Herb Bohrer	Chair, TAC
Susan Lynn	Chair, Area 3

Staff Present

Susan Gilbert	Senior Program Analyst
Steve Berkey	Senior Program Analyst
Linda Rivera	Senior Program Analyst
Russ Pool	Database Analyst
Judi Nicholas	Program Manager
Louis Morizio	Program Manager
Nancy Ferree	Program Manager
Roy Block	Program Manager
Audrey Jenkins	Program Analyst
Marisa Knispel	Program Analyst
Lisa Gabriel	Program Analyst
Ellen Smiley	Program Analyst
Marianne Ayala	Program Analyst
Donna Powers	Program Analyst



Patti Robb	Program Analyst
Janice Spinks	Program Analyst
Tim Shepard	Program Analyst
Leasia Brooks	Secretary

Guests

Cindy Williams	Area 6 Panel Member
Jackie Granger	Area 4 Panel Member
Bob Hayden	Area 4 Panel Member
Richard Balancia	Area 5 Panel Member

Members of the Public

Howard Margulies (Former TAP Member)

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval March Joint Committee Meeting Minutes

Minutes were approved by consensus with minor corrections.

Review of Action Items—Tom Walker

None

National Office Report—Shawn Collins

The Joint Committee face-to-face meeting will be held July 25-27, 2011 in Seattle, Washington. Travel days are July 24, 2011 and July 27, 2011.

The annual meeting will be held in Washington D.C. A meeting location has not yet been determined. Additional information will be provided as the date approaches.

Collins reported that the draft refocus recommendation from the staff was presented to NTA Nina E. Olson. NTA Olson was in agreement with the majority of the information provided. Collins stated TAP is still in the process of working certain issues in an effort to formalize the plan. Collins stated the main focus of the face-to-face Joint Committee meeting is to complete the reorganization plan.

Walker requested members remain at the Joint Committee meeting in Seattle, Washington on Wednesday through noon or as long as possible.

TAP Chair Report—Tom Walker

Walker commented TAP is currently doing a good job of pushing issues through the pipeline. Walker stated as of April 26, 2011 there are 10 issues rebutted to the IRS, 31 issues that have been sent to the IRS and are awaiting a response, 1 issue in Joint Committee quality review, 12 issues that TAP is monitoring IRS action, 8 issues on today's call, 4 issues that are being reworked by the Areas, 7 issues returned from IRS that have not been closed.

Walker requested Area Chairs and Area Managers that have active issues, issues in the above categories, or issues not yet elevated to the Joint Committee be completed and elevated to the IRS no later than the Joint Committee face-to-face meeting in July.

Area Issues for Review

Area 1

Issue #19594 Forms and Publications Search Engine on irs.gov—Marisa Knispel provided a brief background on the issue, stating the committee's suggestion is that the IRS update the search engine under the forms and publications section of irs.gov, so that it operates in the same manner as the search engine located on the main page of the website.

Decision—The Joint Committee by consensus elevated the issue to the IRS.

Area 2

Issue #17259 Form 1040 PDF—David Cain provided a brief background on the issue, stating the committee's suggestion is that the IRS correct Form 1040 PDF data requests by adding text boxes to lines 7, 15b, 16b, 19, 58, 62, and 64a.

Decision—The Joint Committee by consensus sent the issue back to the Area for corrections and resubmission in May.

Area 4

Issue #18434 Signature Clarification on Form 8868—Bob Hayden provided a brief background on the issue, stating the committee's suggestion is to indicate in the instructions for Part 1 that a signature is not required, and in Part 2, specify that a signature is required. Also, on the second page, insert a line of text that states signature and verification must be completed for Part 2 only.

Decision—The Joint Committee by consensus elevated the issue to the IRS.

Issue #18632 Highlight e-filing in Form 2290 Instructions—Jackie Granger provided a brief background on the issue, stating the committee's suggestion is to change the sentence with new language by stating independent truckers are to file Form 2290 electronically. The new language should also state, "Once the return is accepted by the IRS, the stamp Schedule 1 will be available within 24 hours. For more information on e-files, visit www.irs.gov and search 2290 e-files. Electronic filing is encouraged and available to all taxpayers. However, electronic filing is required for each return reporting 25 or more vehicles."

Decision—The Joint Committee by consensus elevated the issue to the IRS.

Area 5

Issue #19035 Change Address on IRS Website—Richard Bilancia provided a brief background on the issue, stating the committee’s suggestion is for the IRS to implement a single place for individual taxpayers to use on the IRS website to change individual addresses.

Decision—The Joint Committee by consensus elevated the issue to the IRS.

Issue #19279—Registered Letters Signed for by Company Officers

(Resubmission)—Ken Donnelly provided a brief background on the issue, stating the committee’s suggestion is that the IRS should mail critical notices (levy, seizure of property) as restricted delivery to the officers/owners of the company. Donnelly stated restricted delivery will ensure that the mail is only delivered to the person specified.

The committee expressed concern the process would be an additional burden to both the IRS and companies.

Decision—The Joint Committee by consensus did not elevate the issue to the IRS.

Area 6

Issue #16844 Offer in Compromise (OIC) Process Not Disclosed—Cindy Williams provided a brief background on the issue, stating the committee’s suggestion is to add to Publication 1, *Your Rights as a Taxpayer*, Publication 17, *Your Federal Income Tax*, and to the “*What if You Cannot Pay?*” section of the Form 1040, *U.S. Individual Income Tax Return*, a statement explaining an OIC. Although Publications 1 and 17 mention OIC, it is not fully explained.

Decision—The Joint Committee by consensus elevated the issue to the IRS.

Area 7

Issue #19116 Taxpayer Response – Discontinue Forms Requests—Patti O’Neill provided a brief background on the issue, stating the committee’s suggestion is for the IRS to close an issue when the taxpayer has provided all relevant information and facts to the IRS, or provide consistency by sending the forms to the taxpayer in the initial contact.

Decision—The Joint Committee by consensus elevated the issue to the IRS with corrections.

Project Committee Review

AD HOC

Issue #20173 Taxpayer Expectations—Marianne Ayala provided a brief background on the summary. Ayala stated once the results of the project are available, TAP will be provided with more information.

Decision—The Joint Committee by consensus approved the project for submission.

Refocus Update—Walker stated he was able to attend all seven Area calls. Walker shared his vision of the refocus with each of the Areas and developed a written draft. He has forwarded a draft copy to Steve, Shawn and John for review/comments. Walker stated upon TAP Staff review, TAP members will be given an opportunity to review and submit suggestions. Walker stated some major concerns raised were questions to whether or not TAP should assign Area committees to individual buckets. Another concern is minimizing costs within TAP. As a result, there may be a reduction in project committees. Walker encouraged everyone to submit suggestions to TAP.

Toll-Free Task Force Issues—Walker provided a brief background on the issue. The committee agreed the Toll-Free Task force should move forward with the issues.

Decision—Nancy Ferree and Harlan Barnett will create a timeline and present at the next meeting.

Notice 2011 39 Guidance Priority List—Walker provided a brief background on the issue. Walker asked if TAP would like to submit a response to the IRS for inclusion on the 2011-2012 Guidance Priority List. Responses are due to IRS no later than June 1, 2011. Responses would have to be approved by the Joint Committee prior to submission to IRS.

Decision—Mary Jo Werner, Patti O'Neill, and the Florida staff will address the issue on behalf of TAP and submit responses in May.

Recruitment Update—Steve Berkey stated as of today, TAP has 380 applications submitted. Ranking will be held in Washington D.C. next week. Interviews will take place in June. Berkey stated that the committee will ask for member assistance during the interview process. Berkey thanked members for their support during the application period in getting the word out to the public.

2010 Annual Meeting Roll-up Report—Susan Gilbert stated that she and Communications Committee members Tom Walker and Seth Flanders held a conference call on April 25, 2011, with Roy Block and Patti Robb attending and began working on the Annual Meeting agenda. The committee members will continue to work on the agenda during the Communications face-to-face meeting.

Project Committee Update—John Kim requested the remainder project committees submit their updates this week. Walker reminded the committees the purpose of the



spreadsheet is for the Joint Committee to be able to review the status of projects during the monthly calls.

Public

Walker thanked Howard Margulies for joining the call.

Closing

Meeting Adjourned

Next Meeting: May 26, 2011 @ 2:00PM ET