



**Taxpayer Advocacy Panel
Joint Committee
Meeting Minutes
March 24, 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
Susan Lynn	Chair, Area 3
Mary Jo Werner	Chair, Area 4
Ken Donnelly	Chair, Area 5
Anne Rasmussen	Chair, Area 6
Patricia (Patti) O'Neill	Chair, Area 7
Harlan Barnett	Chair, SBSE-Toll Free
Herb Bohrer	Chair, TAC
Ernest Miller	Chair, Notices
Mary Jean Potenzzone	Chair, SBSE-Practitioners Experience
Donald Thomas	Chair, Forms and Pubs
Stephen Vanderver	Chair, VITA
Susan DaCorte	Chair, Communications
Sue Tatum	Vice Chair, EITC

Members Absent

Erica Webber Chair, EITC

Staff Present

Susan Gilbert	Senior Program Analyst
Steve Berkey	Senior Program Analyst
Linda Rivera	Senior Program Analyst
Russ Pool	Database Analyst
Otis Simpson	Budget 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
Meredith Odom	Program Analyst
Lisa Gabriel	Program Analyst
Ellen Smiley	Program Analyst



Marianne Ayala	Program Analyst
Donna Powers	Program Analyst
Anita Fields	Program Analyst
Patti Robb	Program Analyst
Tim Shepard	Program Analyst
Leasia Brooks	Secretary
Rose Babb	Secretary
Annie Haywood	Secretary

Guests

Mark Bernstein	Area 1 TAP Member
Cheryl Morse	Area 1 Vice Chair
Diedra (DeDe) Jackson	Area 3 TAP Member
Ebony Moss	Area 3 TAP Member
Jackie Rollins	Area 5 TAP Member
Aileen Fisher	Area 7 TAP Member

Members of the Public

None

Welcome/Announcements/Review Agenda

Tom Walker opened the meeting and welcomed everyone.

Roll Call

Leasia Brooks took roll call and quorum was met.

Approval February Joint Committee Meeting Minutes

Minutes were approved by consensus, with no changes.

Review of Action Items—Tom Walker

Tom Walker reviewed the action items from the February call and reported all have been completed.

National Office Report—Shawn Collins

No items from the National Office.

Shawn expressed how excited she is to return to TAP. She also thanked Steve Berkey for doing an outstanding job as the Acting TAP Director in her absence.

TAP Chair Report—Tom Walker

Walker commented on the QR report and elevated issues that are available for review and the report should be used as a management tool. Walker asked that Managers assist

Area Chairs in turning items around either for JC consideration or closure. Walker indicated the goal is for items to be elevated to the IRS and approved.

Walker stated that he, John Kim, Shawn, and Steve met with NTA, Nina Olson. Walker reported from the meeting that the Area face-to-face meetings are cancelled due to TAP budget restraints. Project committees are not affected. Walker apologized if his previous e-mail message regarding the cancellation of the area meetings was unclear.

Strategic Plan

Walker provided a brief background on the issue and opened the floor for questions and comments.

Walker stated sections of the strategic plan are already in process and have been implemented.

Decision—The Joint Committee by consensus will implement the Strategic Plan.

Area Issues for Review

Area 1

Issue #17063—Power of Attorney for Substitute for Return—Mark Bernstein provided a brief background on the issue, stating the committee’s suggestion is to minimize the number of power of attorneys needed for joint filing along with a provision for subsequent filing in the case of objection by one party. Also to get the IRS to acknowledge and allow a power of attorney signed by both taxpayers to be valid for both or either taxpayer. A correction raised by David Cain and Mary Jean Potenzzone was accepted and the comment should be added for future reference or any confusion as to what exactly was requested. “The Referral Solution recommended should only apply to Forms, 2848, POAs executed after the issuance of the PFRs.”

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

Area 4

Issue #18396—Revise Form W-4 w/attachment—Mary Jo Werner provided a brief background on the issue, stating the committee’s suggestion is to modify the Form W-4 by adding language to allow reduction in federal tax withholding.

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

Area 5

Issue #18628—Change ACS Letter 1085 w/attachments Jackie Rollins provided a brief background on the issue, stating the committee’s suggestion is to use the standardized ICS version instead of the ACS’s computer generated letter.

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

Area 7

Issue #17315—Incorrect Processing of Retirement Income form Sch. K-1 (Form 1065) Aileen Fisher provided a brief background on the issue, stating the committee's suggestion is to make Line I a check box to indicate whether or not the partner has a retirement plan, have it subject to transcription for computer processing, and modify the matching program.

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

Issue #17381—Free Electronically Filed Tax Returns Patti ONeill provided brief background on the issue, stating the corrections in the resubmission focus on the benefits and barriers separately, making the issue clearer.

David Cain commented that electronic filing is a cost benefit. He also stated there is a 15 percent error rate on paper filing versus a .5 percent on returns filed electronically.

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

Issue #18158—Multiple Notices Are Sent For the Same Issue ONeill provided a brief background on the issue, stating the committee's suggestion is to merge multiple inquiries on prior quarters into one notice.

The committee expressed concern that with the change, the taxpayer may confuse the combined notices as copies and ignore them.

Roy Block explained the IRS considers each quarter as a separate return.

Decision—The Committee will return the issue to the Area to conduct further research for resubmission next month.

Project Committee Review

Tax Forms & Pubs

Issue #20165 Review of Schedule F and Instruction—Donald Thomas provided a brief background on the project. Thomas asked if there were any questions or comments.

Action Item: Harlan Barnett will send the document to Marisa Knispel for format changes. The Committee will also review line items for accuracy.

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

Issue #20166 Review of Publication 502—Walker opened the floor for questions and comments. There were no questions or comments.

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

Notices

Issue #18995—Frequently Asked Questions for CP Notices

Issue #19823—Frequently Asked Questions for 9 CP Notices

Issue #19826—Frequently Asked Questions for 14 CP Notices—Ernest Miller provided a brief background on the project. Miller stated projects 19826, 19823, and 19826 are all related to one single project that will be completed in phases. All three projects have the same benefits and barriers.

Action Item: Barnett will send Issues #18995 and #19823 to Audrey Jenkins for corrections and format changes.

Decision—The Joint Committee by consensus approved the projects for submission to the program owner with a few corrections.

Toll-Free Task Force Issues—Herb Bohrer and Barnett provided a brief background on the issue, committee suggestion is to review the IRS response to the NTA on this Most Serious Problem, as well as toll-free issues identified to TAP.

Recruitment Update

Berkey stated the TAP recruiting campaign opened March 14, 2011 and the Recruiting News Release went out on March 23, 2011. During the first week of recruitment 60 applications were completed. To assist TAP members in the recruitment effort, members were provided recruiting promotional material for use in outreach efforts. Berkey stated TAP will do specific targeted recruiting in those areas with low recruiting numbers and will need TAP members to assist in those particular areas.

2010 Annual Meeting Roll-up Report

Susan Gilbert stated the feedback from the evaluation forms were received and will serve as the 1st step in planning the next annual meeting. Gilbert thanked Rose Babb for her assistance on the project.

Area/Project Committee Activities

Action Item: Walker asked the Project Committees to submit an update to Kim 10 days prior to the monthly conference call.

TAP Refocus

Walker made an announcement that the decision had been made by Nina Olson that the TAP focus would be changing. The Area Committees would concentrate on outreach and gathering issues. The Joint Committee would determine what issues would be developed. More information will be coming as the details are worked out.

Public

None



Closing
Meeting Adjourned

Next Meeting: April 28, 2011 @ 2:00PM ET