



2009 Meeting Minutes Area 1

- December 15, 2009
- November 17, 2009
- October 20, 2009
- September 15, 2009
- August 18, 2009
- July 21, 2009
- June 5-6, 2009
- May 19, 2009
- April 21, 2009
- March 17, 2009
- February 17, 2009

**Annual Meeting
Washington, DC
Area 1 Committee Meeting
December 15, 2009
California Room 10:00am – 4:00pm (EDT)**

Designated Federal Official

- Benedetti, Elaine, LTA, Rhode Island

Program Manager

- Morizio, Louis, Tap Manager

Committee Members Present

- Alvarado, Frank
- Bernstein, Mark
- Cabusora, Haidee
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Leggett, John, Vice-Chair
- Morse, Cheryl
- Murray, Alan
- Steinberg, Jeffrey
- Stepner, Gerald

TAP Staff

- Babb, Rose, TAP Management Assistant
- Jenkins, Audrey, TAP Analyst
- Odom, Meredith, TAP Analyst



Other Attendees

Dora Woodard, Revenue Officer - SME
Laura Tanis, Revenue Agent - SME

Introduction/Icebreaker – John Leggett

In the absence of Gambardella the Chair of Area 1, Leggett welcomed everyone by asking members and staff to introduce their selves.

2009 Accomplishments

Murray mentioned a host of issues that were worked and forwarded by the committee. Some of the issues were Processing time of 1040X, Voice Activation, Availability of Forms 8109 in Taxpayer Assistant Centers and Form 8582 – Passive Activity Loss Limitations and Form 4720 – Return of Certain Excise Taxes were sent to the Form and Publications Issue Committee.

Committee Organization – Louis Morizio

Morizio discussed the 2009 Outreach activity and pointed out 3 Goals of outreach;

- Inform the public about TAP
- Identify Issues
- Recruitment

Committee Elections

Cheryl Morse – Chair
Felicia Garant - Vice Chair
Gerald Stepner – Vice Chair

Members should always refer to their TAP Member Handbook and review their responsibilities as a Chair, Vice Chair or Tap Member. They should be respectful to each other and to other’s opinions, and avoid personal attacks. They should contact members of the staff if they are unable to join teleconference calls.

Travel Costs

Leggett discussed some concerns that other members shared regarding expensive travel costs. Leggett stated that members should not be subject to the same restrictions as government employees. Morizio asked Leggett to write up his concerns as an issue.

Area 1 Ground Rules – Cheryl Morse

This year Morse wants to focus on the issues while using the talents of members. This could be accomplished by devising the committee into three subcommittees - Writing, Screening and Research. The Screening Committee will be responsible for filtering the issues as they come in. The Research Committee will be responsible for all research and for the preliminary written proposal. The Writing Committee is responsible for writing the final proposal for committee approval. Since members have different skills in writing, screening and research, they could be assigned to the subcommittee that best uses those skills.

Monthly teleconferences:

Full Committee - third Tuesday of each month at 10:00am EST
Screening Subcommittee – third Tuesday of every month at 11:00 am EST
Research Subcommittee – When needed
Writing Subcommittee – When needed



Subcommittee Assignments – Cheryl Morse

The committee reviewed the list of issues and assigned them to the three subcommittees. Jenkins will provide the committee with the list of issue assignments.

Administrative Items – Louis Morizio

The January 19, 2010 meeting will be administrative meeting because there will not be enough time for it to be announced in the federal register. All pre-reads will be available on TapSpace. There will be a tutorial for new members during this week on using TAPSpace.

Face to Face Meeting – June 3- 5, 2010, location to be determined. The possible locations are: New York, Rhode Island and Boston.

Quorum will be 50% of the committee plus 1.

Taxpayer Advocate office Hot Topics – Elaine Benedetti

Collection policies are one of the most serious problems for Nina Olsen. Some of the topics are withdrawal of liens, and OICs (Offer In Compromise) Olsen thinks OICs should be more accessible to taxpayers, even as the accepted rate for OICs has declined.

In 2002, levies and SS (6331h) authorization to levy was up 15%. There was a filter in levies by IRS but GAO reviewed the issue and requested IRS to remove the filter. Also, some refundable credits are taking too long to process by IRS.

EITC Awareness Day – Susan Gilbert

EITC Awareness day is January 29, 2010. TAP is working closely with SPEC to make sure we receive the list of all of the EITC events. TAP staff will forward the lists of locations as it is distributed.

Meeting Closing

Morse charged the Screening subcommittee with the remaining list of issues for report at the January Screening Committee meeting.

Next meeting January 19, 2010 10:00 am EST via teleconference.



**Area 1 Committee Meeting
November 17, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Designated Federal Official

- Morizio, Louis, TAP Program Manager

Committee Members Present

- Gambardella, Linda, Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Jason, Julie
- Leggett, John, Vice Chair
- Morse, Cheryl
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Cabusora, Haidee

TAP Staff

- Babb, Rose, TAP Management Assistant
- Odom, Meredith, TAP Analyst

Other Attendees

- Benedetti, Elaine, Rhode Island, LTA

Welcome/Announcements

Gambardella welcomed everyone to the call.

TAP Director – Shawn Collins

Collins joined the call and expressed her appreciation to Jason for her commitment and time with the TAP program. She also thanked the current members for their hard work.

Joint Committee Report – John Leggett

The National Taxpayer Advocate Nina Olson has given her approval for the agenda content for the annual business meeting in December. A request was made for all current chairs to talk to their area members to get a commitment from those who are willing to be mentors for the new members. Leggett and Morizio suggested that any members who are interested should email both Babb and Jenkins on this matter.

Gambardella agreed to help out; in addition, she stated that the mentoring process makes the transition much easier for the new members.



Morizio mentioned the list with new members was released today and there will be three new committee members for Area 1 next year.

November is the last working meeting of the joint committee. The following was mentioned by Gambardella as a possible issue:
Forms 1096 and 1099 cannot be printed from the IRS website, they have to be purchased. IRS does not provide a user friendly form to taxpayers.

DFO Report – Louis Morizio

Last month the Local Taxpayer Advocates and TAP managers attended the conference and one of the issues that came up was vacating a lien. Olson discussed it quite extensively and, counsel's opinion is that nothing is stopping the IRS from giving the taxpayer a lien withdrawal rather than a lien release so as not to hurt his/her credit record.

Subcommittee Report Out Subcommittee 1

Subcommittee 1 discussed the lien withdrawal issue at its last conference call and whether the withdrawal is the same as vacating a lien on a credit report. Morizio stated that a lien withdrawal is the equivalent of vacating a lien, as opposed to a lien satisfaction which does not remove the lien from the credit report.

Jackson is working on the IRS computations of the appropriate amounts of penalties and interest when the IRS takes too long to process an amended return. Murray is still concerned about attachments to tax returns that are lost during processing. He stated that this creates unnecessary work for the taxpayer.

Gambardella brought up the issue about the applicable dates on Form 941; those dates are now printed on the form when formerly the taxpayer filled the dates. Gambardella has examples of taxpayers that filed form 941 and did not pay attention to the dates resulting in monies applied to the wrong period, causing the taxpayer to receive a notice of deficiency.

Murray mentioned that the subcommittee agreed that Form 941 should remain blank without a date. Murray also stated that the issue of the 1040 voice activation line for taxpayers is still being worked on. IRS has approved the voice activation, but it was not implemented.

Subcommittee 2

Morse delivered the report-out for Subcommittee 2. On the last call, November 3, there were four subject matter experts for the IRS Toll Free Line, answering questions. The Subcommittee tried to get a sense of what exactly the procedures are and whether or not the responders on the phone lines are pressured to pass the calls on. One of the subject matter experts had written up the rejection for the voice activation line. Morse inquired if the subject matter experts can respond to questions Deller had written up. There were responses to written questions from Leggett but none from Deller's questions.

Garant has some write ups from forms and pubs, they were sent to Ayala. Morizio noted that those issues are in TAP space but not in the correct format for TAP space. Morse's write up on bait and switch with free file is also in TAP space as well; this issue will be elevated to the IRS. Morizio asked Odom to follow-up on responses to the letter prepared by Gambardella regarding TAP issue 109-5529, Toll Free Voice Recognition Option to Debra Awalt, CAS.

Office Report

Morizio mentioned that he is working on getting some subject matter experts for the annual meeting including both a revenue agent and a revenue officer technical advisor to answer all exam and collections questions. The experts will be asked to stay around for the subcommittee break outs to answer any further questions.



Round Robin for Outreach

Gambardella did an outreach at a street fair in Suffern, New York in October; Deller joined Gambardella at that outreach event. Gambardella was asked to speak to the Association of CPAs in Westchester, NY in January 2010.

Garant attended the Maine Tax Forum held in Augusta, GA this event had over 700 people. The Forum was sponsored by the IRS and Thomas College. The exposure was good, particularly because the table was shared with TAS. Garant received feed back from people interested in being part of TAP.

Gibbons has done some one on ones. She mentioned that the legislative groups are coming into town and, she plans to meet with them at the state house. She is trying to get on a local television station in the community and hopes it will be an ongoing event. Gibbons mentioned that she will be attending a Vermont Tax Practitioner Liaison Committee meeting on December 2, with Joe McCarthy. She is expected to make contact with AARP and is working on making contact with a list of all of the local people within 100 miles radius to set up some speaking engagements.

Leggett had a few one on ones where he discussed TAP and received complaints on legislation. He stated that most people he spoke to did not know about TAP.

Morse had some speaking engagements with at least 100 people per session (about two to four times weekly) with tax professionals. She received a few suggestions from the public. She also mentioned that the tri-fold marketing materials are very useful.

Murray had some one on ones; his alumni magazine did not produce much. He is looking forward to the CPA meeting coming up in January, 2010 in Westchester.

Stepner continues to spread the word about TAP; he appeared in the local newspaper with Congresswoman Tsongas and attended several community breakfasts.

Closing:

Morzio stated that when doing outreach, the committee members should consider recruitment effort. TAP will be recruiting from a number of states including Vermont, Rhode Island, New Hampshire, and Maine. The alternates from these states will be rotated off the panel and will need to be replaced. Morzio asked members if they come into contact with people from those areas that may be qualified, to please try to get their contact information submitted to the TAP office.

Morzio thanked everyone for their participation. The committee meets at its face to face in, DC in December.



**Area 1 Committee Meeting
October 20, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Designated Federal Official

- Fallacaro, Betsy, LTA Boston

Committee Members Present

- Gambardella, Linda - Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Jason, Julie
- Markman, Robert
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Cabusora, Haidee
- Deller, George
- Leggett, John – Vice Chair
- Morse, Cheryl

TAP Staff

- Babb, Rose, Management Assistant
- Jenkins, Audrey, TAP Analyst
- Odom, Meredith, TAP Analyst
- Morizio, Louis, TAP Program Manager

Alternates Present

- Kates, David
- Bernstein, Mark
- Steinberg, Jeffrey

Other Attendees

- Alvarado, Frank (prospective member- Connecticut)
- Benedetti, Elaine, LTA Rhode Island

Welcome/Announcements

Gambardella welcomed everyone to the call. The National Taxpayer Advocate, Nina Olsen has announced that 15 new members are waiting final approval from the Department of the Treasury for membership to TAP.



Joint Committee Report- Linda Gambardella

The following issues were discussed at the joint committee meeting:

- Extension of filing date for Form 1041 by trust was approved to elevate and covered employment of child and spouses.
- Area 1's Form 1040X issue was approved with restrictions (take out e-filable)
- There will be a workshop for new and returning members on TAP Space at the Annual meeting.
- Justin Axelrod, Area 2 member will be available to provide guidance on how to setup a webpage for TAP at the Annual Meeting.

DFO Report – Betsy Fallacaro

An analyst from her office has forwarded Jenkins a list of outreach events via email. Members should take a look and contact their LTAs if they are interested in attending.

The week of 10/26/09, all of the LTAs and TAP Managers will be attending a Leadership Conference in Washington, DC. If any members have any ideas, forward them to either Morizio or Fallacaro and they will take them to the leadership conference.

Fallacaro introduced, Elaine Benedetti, Rhode Island LTA. Benedetti will be taking over as the DFO for Area 1 starting next year and will also be attending the TAP Annual Meeting in Washington, DC in December.

Subcommittee Report Out Subcommittee 1-Alan Murray

The subcommittee discussed the wording of the IRS Liens on Property. The committee suggests there should be a system in place to differentiate vacated liens from satisfied liens. This is helpful to protect the taxpayer's credit history. Form 941 – some taxpayers are not sure which one to print out from the website.

Subcommittee 2- Jenkins/Odom

Form 8109B sent to Joint committee discussion should go to TAC committee.

Leggett is working on 1040 toll free line in regards to hold times, drop calls, etc.

Garant is working on satisfaction on campus services in Florida office. Jenkins will contact Bonnie Fuentes to address the issue of social security numbers to be removed from taxpayers checks.

Morse would like to see "Speak Up" brochures in other languages. Attachments to tax returns (Taxpayers are being asked for the same information they have already submitted to the IRS), Jenkins will follow up.

Complaints on Offers and Compromise, Jenkins will research data base because Area 5 has been involved in this issue.

Office Report

Morizio stated that Shawn Collins, TAP Director will be attending all November area conferences to say farewell to those members that will be leaving TAP. Area 1 will be gaining one (1) new member for the state of Connecticut and a few alternates for Massachusetts and for New Hampshire.

When responding or initiating emails, please ensure to include your subcommittee members and staff. It is always helpful when someone else is asked to step in and report out.



Public Participation

Jeffrey Steinberg - is working on an issue with 75 year taxpayer with a 2007 Tax Return. He stated that the West Nyack office was not helpful at all. When the taxpayer went into the TAC office for assistance he was told that his return could not be prepared. In addition, he said that it is not specified in Publication 17 that when a 1099 is received from a broker the taxpayer must file a tax return. Jenkins asked Steinberg to send her an email outlining the problem so it could be further discussed and assigned to a subcommittee.

Round Robin

Stepner is attending a series of community breakfast and will be distributing TAP material.

Markman was not able to attend the Suffern, NY Street Fair with Gambardella, and Deller. Markman will be attending an instructors meeting for next filing season will be speaking to about 25 people.

Jason is making contacts with small business owners.

Garant attended a face to face meeting, will be attending a Tax Forum next month in Atlanta.

Gibbons is making a lot of contact with small business owners. She made contact twice with two (2) AARP tax coordinators, but haven't heard from them.

Murray attended face to face meetings. Deller sent him an email on a CPA meeting in New York. He plans to attend on 11/18/09- can only attend in the morning.

Gambardella stated that the street fair in Suffern, NY was very good the turn out was over 200 people. She spoke to a candidate running for a state position regarding TAP and discussed how TAP can benefit NYC. She is promised feed back on spearheading a TAP event.

Closing Remarks: Gambardella will be in Rome, GA working on VITA testing software next week. November will be the last meeting for the year before the Annual Business Meeting in Washington, DC.

Next meeting will be November 17, 2009 at 10am EDT.



**Area 1 Committee Meeting
September 15, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Program Owner

- Fallacaro, Betsy, LTA Boston
- Tehrani, Bernardita (Acting Brooklyn, LTA)

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Deller, George
- Gambardella, Linda - Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jason, Julie
- Markman, Robert
- Leggett, John – Vice Chair
- Morse, Cheryl
- Murray, Alan
- Stepner, Gerald

Alternate Members Present

None

Committee Members Absent

- Cabusora, Haidee
- Jackson, Robert

TAP Staff

- Babb, Rose
- Jenkins, Audrey
- Odom, Meredith

Other Attendees

- Bernstein, Mark
- Wall, Judy (Office of Chief Counsel)
- Steinberg, Jeffery

Welcome/Announcements

Gambardella welcomed everyone to the call.



Joint Committee Report

Gambardella said the following: A lot was accomplished at the Joint Committee in August, in Atlanta. Issues brought forward were 8109-B. Area 5 will roll this issue into the TAC report. The issue of the 1040 line (voice activation) worked by Garant was approved. The yellow book was not elevated by the Joint Committee since they felt that it was a yellow book issue and not an IRS issue. The amended returns issue was approved with the condition to take off the E-file.

Another exciting issue brought up at the joint committee meeting by Kimberly Brown, Area 2 Chair was a mentoring program for new TAP members. This can be very beneficial for the new members coming on board. An email will be sent outlining the discussion of the Joint Committee meeting.

DFO Report out

Fallacaro said the following: This is the end of the year, and that there were lots of complex cases - for example, stolen identity, collections, exam.....There is an outreach event in October, and an email will be sent via Jenkins to distribute to panel members with the information. Nationwide, TAS is maintaining their quality and is doing well. EITC customer satisfaction is also very good even with a slight decline, but that may be due to the complex cases or other things may be affecting the performance. Panel members should check with their LTAs to find out about outreach in their areas.

Office of Chief Counsel

Wall was invited to discuss proposed regulations. Jenkins had emailed members a copy of the document "Proposed Rules" Department of Treasury. Wall stated that the Proposed Regulations were published on 7/27 in the federal register and she provided an overview of Section 7811- IRS codes including additional sections. The preamble provides explanations if members have any questions.

Subcommittee Report Out

Subcommittee 1

Murray gave details about the subcommittee meeting last week. Jackson is working on accrued penalties and Interest and IRS delays in responding to taxpayers.

Gibbons is working on the wording of lien releases have them changed from "Satisfied" to "Vacated". Gambardella provided a list of possible issues that came out of the New York Tax Forum. The subcommittee will review and consider them .

Murray also said that the last full area teleconference call had a subject matter expert that discussed the question of attachment to returns. He said the subcommittee members were not satisfied with the expert's answers and would like to pursue that further. On the issue of calls on the 1040 line, it does not give an option to leave a message and have someone return the call. On a practitioner or business entity line there is that option. The subcommittee will like to pursue that as well.

Jenkins stated that she will provide a full report of all the issues that came from the Forum and the issues from Morse's outreach and send to the full committee. Morizio will have Odom take a look at the issues - things that were also the same and update the database with active, new, and parking lot issues sent to members. Morizio said that members should take a look at the issues that are interesting, that would be the best ones they would volunteer to work.

Subcommittee 2

Morse said the following: New issues were discussed. TAP materials are not available in Spanish. TAS is available in a number of languages. Her subcommittee is looking into having TAP publications translated into other languages.



Gambardella said that the 1040x issue was approved by the joint committee and that the E-file portion must be taken off since it was not approved. She also said that another section (that the IRS wants to extend the time from 120 to 180 days for processing 1040X) was added and it will be sent out to the full committee.

Garant will look into inconsistencies in different service centers and how they handle taxpayers. The Form 8582 should state on it "Suspended Losses", not "Unallowed".

Office Report

Morizio said the following:

TIGTA's audit of the TAP Program was shared at the Joint Committee last month in Atlanta, GA. The audit is still in draft mode. A few recommendations were discussed for example, how does TAP code issues – Fully Accepted, Partially Accepted or Rejected. The report will be shared with TAP when it is finalized.

On the last Joint Committee meeting the Taxpayer Assistance Center (TAC) Survey was discussed. A decision was made at the National Taxpayer Advocate level not to participate. The reason for not participating is due to TAP was not allowed to give input to the entire process. TAC just wanted TAP members to hand out the survey at the walk in office.

Regarding recommendations / Proposals currently being worked on at the area level.- They do not have to be completed within the year. Issue committees do have to complete their assigned task by the end of the year. By the following year, the program owner will give new projects. Areas can start working on recommendations now and carry over to the new year.

One more issue was elevated to the Joint Committee (Estate taxes on line) the Joint Committee did not approve it because another area had already worked a similar issue similar to that. It was elevated back in May. It will be discussed with the IRS – Gambardella pulled back this proposal waiting for a response from the other area.

Round Robin

Gambardella – She is heading up an outreach on October 4, at the Suffern Chamber of Commerce in Suffern, NY. TAP T Shirts will be ordered. She hopes to have a huge turnout. Another outreach is being planned with Kimberly Brown, Chair of Area 2.

Garant- Glad to be a part of TAP NY Forum was a lot of fun.

Jason – Doing individual outreaches no group set up yet until Oct. 2009.

Markman – Town of Hempstead, NY is having a VITA training, will be speaking to instructors for program and the actual VITA tax preparers.

Stepner – He is speaking to folks individually and continuing to spread the word on TAP.

Closing Remarks: Thanked everyone for joining the call.

Next meeting will be October 20, 2009 at 10am EDT.



**Area 1 Committee Meeting
August 18, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Program Owner

- Fallacaro, Betsy, LTA Boston

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Cabusora, Haidee
- Gambardella, Linda
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Jason, Julie
- Leggett, John
- Markman, Robert
- Murray, Alan
- Stepner, Gerald

Alternate Members Present

None.

Committee Members Absent

- Deller, George
- Morse, Cheryl

TAP Staff

- Babb, Rose, Management Assistant
- Jenkins, Audrey, Analyst
- Odom, Meredith, Analyst

Other Attendees

- None

Welcome/Announcements

Gambardella welcomed everyone to the call.



Joint Committee Report

Gambardella said that the Survey is still in the office Wage and Investment (TAC) Taxpayer Assistance Center. TAP's participation was discussed - TAP will only have a limited role in the survey administration. Morizio's comments at the Joint Committee meeting succinctly stated TAP's position: "TAP should be apart of the survey going forward because the panel members volunteer their opinions and have some good ideas". This item will be discussed at the Joint Committee at the end of this week. Gambardella will keep everyone posted on the survey.

Some issues discussed at the Joint Committee meeting last month were issues being elevated: Bankruptcy Transfer Taxpayer Refund Notification, Taxpayer updates, Form 1065....will share at next month's meeting the issues that were elevated.

DFO Report

No report out for August.

Subcommittee Report Out

Subcommittee 1

Murray said that the subcommittee did not meet last week, since staff was not available due to training in St. Louis. Committee will need to come up with new issues.

Jenkins mentioned that Morse sent a list of some issues via email to full committee members from her outreach (NATP). Jenkins will forward to those members who did not receive Morse's email.

Subcommittee 2

Jenkins mentioned Morse presented a host of issues received at the NATP meeting for the subcommittee to filter through. Jenkins will forward the email to those members who did not receive it.

Office Report

Morizio mentioned the upcoming New York Tax Form on 8/25-8/26/09 in New York City. TAP Staff and a few members will be there the first two days of the meeting. There will be a table with marketing material to distribute. TAP's goal is to get new issues coming in. Several members will be with TAP Staff at the forum: Deller, Gambarella, Garant and Markman,

TAC Survey - Will talk about it at the Joint Committee meeting. The information on the first TAC site is 11/16-12/16/09 in Hartford Ct., and 3/15 - 3/31/09 in Jamestown, NY and Boston, MA. Once the time gets closer we will be in touch with members that are located in those areas for participation.

Public Participation

None.

Round Robin

Cabusora said that she is working on a new project, helping expecting students in high school fill out their FASA forms. She is making contact with local colleges and administrative offices and has sent them her business cards.

Gambardella said that she will be doing outreach on 10/4 at a street fair in Suffern, NY. Deller and Markman will be assisting her with this event. She is targeting a large population and will have a banner made up a booth. Jenkins informed her that Cheryl Morse has a banner that she uses and will be glad to loan it to her.

Garant said that she is studying for a Certification exam on 9/18 and will be more involved after the focus is over. Will be attending the NY Forum in New York City.



Gibbons said that she joined a group in Vermont with Women Business Owners and will be speaking for them in November. It gives a good networking opportunity to be in contact with. She is hired to run a "Start your own business" seminar and will also talk to people who want to start and expand their own business.

Leggett said that he is a member of the small business and have found that a lot of tax help is available consequently; there are not a lot of issues as on the outside.

Markman said that he attended the quarterly meeting of NCCPA and noted that there are lots of gripes with the IRS. He found that the National Association of Taxpayers meetings in Reno, NV issues were similar and that he will try to consolidate the issues to see if anything should be brought forward.

Murray said that he had a conversation with the editor of his college alumni magazine. There will be an article coming out on TAP hopefully there will be some issues generated on that.

Stepner said that he has been talking a lot about TAP and hope to have an appearance in the Northeastern Alumni Magazine.

Closing Remarks:

Gambardella thanked everyone for being on the call and that hopefully next month she will have a great report from the joint committee on issues being approved. Will discuss the unrolled preparer at the Joint committee including a speaker from NTA, Nina Olson's office is expected to address TAP.

Next meeting will be September 15, 2009 at 10am EDT.



**Area 1 Committee Meeting
July 21, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Program Owner

- Fallacaro, Betsy, LTA Boston

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Cabusora, Haidee
- Deller, George
- Gambardella, Linda
- Garant, Felicia
- Gibbons, Jo Ann
- Markman, Robert
- Morse, Cheryl
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Jackson, Robert
- Jason, Julie
- Leggett, John

Alternate Members Present

None

TAP Staff

- Babb, Rose, Management Assistant
- Jenkins, Audrey, Analyst
- Odom, Meredith, Analyst

Other Attendees

Lorraine Kearns, TAS Analyst

Welcome/Announcements

Linda Gambardella welcomed everyone to the call.



Joint Committee Report

Linda Gambardella informed the committee that four JC subcommittees were established; Annual Conference Committee, Issue Committee – Getting issues processed and improved Specialty committee set up, Voting and Appointment for new TAP chair and Specialty committee set up for Commissioner Shulman/Olson meeting. Gambardella discussed the Area 1 face to face meeting that was held in June in Brooklyn at the Joint Committee meeting. Gambardella also asked that if there are any burning issues that anyone wants addressed at the Commissioner’s meeting those issues should be to sent to her via email.

Subcommittee Report Out

Subcommittee 1 – Alan Murray

The subcommittee has been working the issues that were discussed at the face to face meeting in Brooklyn. The status is as follows:

- Issue 5138 – Amended returns be e-filable was approved at the face to face meeting. He received some feed back and will incorporate them and forward it.
- Issue 5399 – Yellow Book – Joan Gibbons, looks good was approved with edits.
- Issue 5026- Fraud Notification – Jerry Stepner, was approved with edits.
- Issue on 1040 Line - Felicia Garant, with no voice activation was approved with edits.

Subcommittee 2 – Cheryl Morse

The subcommittee is working on issues that were discussed at the face to face meeting in Brooklyn. A number of subject matter experts are needed and will be heard from over the next few months. Robert Markman has a new issue from a cruise he took. He spoke with the Canadian minister of finance. Markman will give the committee the details on that. The Sub committee is working very well. Morse will begin the write up on her issue “Sales Pitches”, free file bait and switch pop ups.

At the face to face in Brooklyn in June, the IRS search engine was discussed. There was talk that it should be brought to communications committee. At the face to face in Nashville, Morse said the communications discussed the IRS search engines and recognized it is a problem but not committed to working on it as of now. Morse has sent Jenkins an email “Non resident Alien Questionnaire” this email is to circulated to all TAP members.

Markman and Gambardella added that they have found that using Google as a search engine, they have found it easier to get information from the IRS for forms, questionsMorse has a few speaking engagements coming up and 18 new issues for the sub committees.

Kearns mentioned that she also ran into a problem with free file income tax and she sent the information to IRS security.

DFO Report- Fallacaro

Locally, TAS is in the process of hiring for the next fiscal year. TAS is also preparing for their symposium in August for two weeks. The symposium is also a good time to talk and come up with issues to address.

SME/Returns Processing – Lorraine Kearns

Using the last four numbers of taxpayers’ social security number is not to the taxpayers’ benefit. In some cases, monies are misapplied. The current system in place uses lock box payments and taxpayers’ have their tear off stubs; this does stay with the checks until it goes through the coding system. Once this is done, they are separated because the deposit rules state that the checks must be in the bank within 24 hours of receipt and IDRS posts to the taxpayers’ account. If there are any questions, these checks are put on microfiche. Kearns said that if members have any additional questions, please have Jenkins get in touch with her.



3.11.3 -1 is the attachment /detachment guide - gives very specific information about attachments to return.

Office Report

Jenkins apologized for sending pre-reads at the last minute but she will try to get all of the issues approved in time for the upcoming Joint Committee meeting.

Morzio reminded members to copy him on all emails to staff this way he can follow up in anyone is out of the office.

Round Robin

Markman- will be attending a symposium for National conference of CPA and parishioners in November and is arranging to get a free table.

Gambardella worked the Chamber Board of Commerce street fair in June and gave approx 2,000 handouts. She mentioned for those who are interested in manning a booth with her in October (no date as yet), she would appreciate them getting in touch with her or Jenkins.

Closing Remarks: Look forward to next month's meeting and a wonderful season with the work that is being done especially regarding outreach.

Next meeting will be August 18, 2009 at 10am EDT.

Gambardella and Morizio thanked all again for their participation.



Area 1 Committee
625 Fulton Street, 10 Metro Tech Center
Brooklyn, New York 11201
8:00-4:30 pm (EDT)

Friday, June 6, 2009

Designated Federal Official

- Fallacaro, Betsy

Committee Members Present

- Deller, George
- Gambardella, Linda - Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Leggett, John – Vice Chair
- Markman, Robert
- Morse, Cheryl
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Cabusora, Haidee
- Jason, Julie

TAP Staff

- Babb, Rose - Management Assistant
- Jenkins, Audrey - Program Analyst
- Morizio, Louis, TAP Manager
- Odom, Meredith - Program Analyst

Guest Attendees

- Corbett, Juanita, Acting LTA, Brooklyn
- Fuentes, Bonnie, LTA, Brookhaven Service Center
- Kideskal, Susan, Analyst, Manhattan
- Nagel, Paul (former TAP member)
- Parra, Luis (former TAP member)
- Sunnie Casimiro, Senior Stakeholder & Partnership Tax Consultant

Welcome/Self Introductions

Gambardella welcomed all members and guests to the 2009 Area 1 face to face meeting.



Joint Committee Report

Gambardella - the IRS is no longer using private debt collectors, the responsibility has shifted back to the IRS. The annual meeting will be held on 12/14 – 12/18 in Washington, DC. An annual meeting committee developed to help plan and improve the annual meeting. Gambardella is on this committee, so please send her any suggestions. Gambardella will also be sending out emails to members and TAP should make clear to our new members what their roles are and responsibilities for our new issues committees. Kelly Wingate from Area 5 is handling entertainment.

Area 2/3/5 welcomed new TAP members. Recruitment has ended for TAP, April 30, 2009 for 2010 membership.

During the Joint Committee meeting, the Albany Town Hall meeting was mentioned. Charles Davidson, TAP Chair stated the outreach efforts were very successful. Several issues were elevated with minor corrections – rude customer service, eliminating ID theft and locking social security numbers and taxpayers writing letters to unlock them when needed. Ken Wright, TAP Vice Chair suggested a new system now in place with new identification number will be tracked. There were 25 issues sent forward to the IRS, 10 of which were accepted. To date none have been implemented.

Members were asked to return their surveys to the joint committees.

National Office Report

Morizio informed the committee that Collins, TAP Acting Director sent her apologies; she could not attend due to budget constraints. Recruitment efforts were very successful and national office staff has determined who will be interviewed. Interviews are set to start on 6/8/09. There was one applicant in the State of Vermont who did not pass the ranking stage therefore was not selected for an interview. Morizio will lead the interview process in Area 1 along with LTAs, FLRP (Front Line Readiness Program), SMRP (Senior Management Readiness Program) participants and members. The interview team was asked to sign into the call a few minutes earlier than the scheduled interview to go over everyone's responsibilities and ground rules. Emails will be sent to the interview team with the questions, interviewee applications, and other pre-reads for the interviews they are scheduled to conduct that day. Area 1 has 21 interviews scheduled.

Updates

Mary-Ann Delzer, National office Analyst has been selected to go on a 60 day detail. In her absence, Dave Coffman, Area 6 Analyst will be doing some database and Audrey Jenkins; Area 1 Analyst will be assisting with the SAMSII project.

Morizio will be attending FACA (Federal Advisory Committee Act) training the week of June 22nd. Collins will be the acting TAP Director at least until December 2009. Morizio also thanked everyone for their participation.

DFO Report

Fallacaro - the filing season finished up with fewer problems with EITC and injured spouse. There were many collections, seizures, levies and audit issues. TAS is hiring more advocates. IRS is hiring more compliance employees also. Betsy's priority this year in outreach is to meet with as many compliance employees as possible to discuss TAS and TAP. TAS is currently working on next Report to congress Tentative topics include Refundable credits, appeals and tax practioners. On of the issues with appeals are they having many more cases, and fewer people. Identity theft is a big issue for all of IRS.

Media Specialists

Dianne Besunder/Kevin McKeon - A power presentation was distributed to panel members and TAP staff providing background on the job of the IRS media specialists. January through April is the busiest times as they are always looking for IRS issues that affect IRS to help tax administration.



Stakeholder Partnership Education and Communications Presentation (SPEC)

Sunnie Casimiro - SPEC goes to communities and partner with CPAs, Firms, and Volunteers Organizations. The partner's primary purpose is to provide taxpayers with tax education, tax preparation and asset building. These partners have the expertise in engaging taxpayers with the realities- building a budget and avoiding tax issues. There is a high school in Manhattan, NY that is involved with VITA program. They are learning how to get ready for life; and budget income to avoid crisis mode. SPEC's focus is on low income earners for example, the elderly may not know where to file and they may not be aware of estimated tax payments. Sonny said that SPEC is looking for ways to reconstruct the VITA program and make more responsible. SPEC will take a hard look at increasing accuracy by next filing season.

Area 1 LTAs

Juanita Corbett, Acting Brooklyn LTA - beginning of fiscal year, October through June, there was 1,117 cases for follow-up and closed out. 150 of those cases were congressional. Levies, Levy releases, Audit Reconsideration, Claims-amended returns, collection issues and, penalties are department collection issues. Congressional cases had about 100, and Refunds are 60-65 cases; others are penalties levies and transcripts with requests. There are fewer problems with injured spouses. TAS received numerous phone calls on stimulus packages. TAS is now hiring case advocates. TAS participated in EITC awareness, and partnered with Brooklyn TAP Office. Met with NY Senator Gilibrand and 250 other agencies to promote TAS.

Susan Kideckal, TAS Program Analyst on behalf of Manhattan LTA - welcomed all TAP members and thanked them for their work as volunteers. Levy issues are more than doubled. TAS has an active outreach program for cancellation of debt, foreclosures... TAS has a very diverse staff and have 57 outreach events planned. Susan Kideckel mentioned that her office in Manhattan is one of the offices that will be handling Ponzi scheme cases; the other office is in Fort Lauderdale, Florida.

Bonnie Fuentes- Holtsville LTA – the Andover Campus handles complaints on ID theft. Look upcoming annual report to congress for ID report for updates. Her office has a large number of cases that are correspondence audits and a huge number of stolen ID cases. There are 60,000 accounts of ID theft. Taxpayers who prove themselves will have an account with a transaction code to file their taxes electronically. Fuentes can be reached at 631-654-6687 631-654-6687 .

Public Participation

Former TAP member, Luis Parra invited members to an outreach event on 6/30/09 for 3 hours at 181st Street and Amsterdam Avenue. He will send information to Morizio to distribute to all interested.

Former TAP member, Paul Nagel stated the Form W4 should be simplified since even an accounting person finds it very confusing. For kids starting their first job, W4 should be a one page form with less writing. He reiterated that Commissioner Schulman said that unscrupulous tax preparers will not put their names on the returns. Robert Markman stated that an association he belongs to came up with a suggestion - make your tax preparer fees a deduction but only if you put down the tax preparer name and EIN number.

Subcommittee Break- outs

Members broke out into Subcommittees to discuss issues for elevation.

Closing Remarks

Gambardella - as volunteers, members make a commitment. Participation on calls is 60% and members should take their responsibility serious to make all conference calls. Issues will not be elevated and changed if members do not step up. She was pleased with the good issues discussed today and she felt that a lot was accomplished.



Saturday, June 6, 2009

Designated Federal Official

- Fallacaro, Betsy

Committee Members Present

- Deller, George
- Gambardella, Linda – Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Leggett, John – Vice Chair
- Morse, Cheryl
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Cabusora, Haidee
- Jason, Julie
- Markman, Robert

TAP Staff

- Babb, Rose - Management Assistant
- Jenkins, Audrey - Program Analyst
- Morizio, Louis- TAP Manager

Other Attendees

- None

Welcome

Gambardella welcomed everyone back to the second day of Area 1 face to face meeting. She thanked everyone for coming and asked members if they have any concerns or problems to email her. Gambardella also stated that if members have any comments and suggestions for this year's annual meeting she would like to hear them. On June 16th the Annual Meeting Committee is scheduled to meet and would like to discuss suggestions/comments at that time.

Subcommittee Report – Out



Subcommittee 1 – Alan Murray

- Issue 5135 – **approved by consensus**
- New Issue – Improving the hold time experience – wait times/approximate wait time
- Issue 5026 – Website Fraud Referral
- Issue 5138 – E- File amended Returns
- Issue 5301 – Centralized Appeals
- New Issue – Delays in processing 1040X & Imposing Interest and penalties on cases while waiting to be worked
- Issue 5496 – Voice Activation
- New Issue – BNC (Business Name Control)
- Issue 5187 – Estate and Trust & 5426 - Form 1040 and Attachments - combined
- Issue 5302 – Delay Notification – **Parking lot**
- Issue 5304 – Lack of Tax Return Preparation at TACs - Dropped

Subcommittee 2 – Cheryl Morse

- Issue – 5134 – Availability of Form 8109 – approved and elevated
- Issue 5132 – Enrolled Agent – Burden Reduction
- Issue 3158 – Late 1099's - **Parking lot**
- Issue 4797 – TAP information in 1040 booklets – will be sent to Communications Committee
- Correspondence Audit – **dropped**
- Issue 5490 – Telephone Numbers for IRS – incorrect or not working
- Issue 5315 – E-File – Free file bait and switch
- Issue 5539 – Toll Free Line – Customer Service
- Issue 5528 – Website – Visually Impaired
- Issue 5530 – Notices - Underlined Text
- New Issue – Insurance

Round Robin

- **Stepner** - the List for TAP Active, New and Parking lot issues should be sorted by number.
- **Jackson** - the text and the table should be the same size.
- **Fallacaro** - the roles were a little blurred, full committee talking over each other.
- **Morse** questioned if there were any ground rules.
- **Leggett** - PowerPoint presentations should be sent to members ahead of time not given at the annual meeting.
- **Gibbons** - emails regarding sender wants to be notified time sensitivity is an issue. The two day agenda was not efficient, it should be down to the minute.
- **Garant** - would like to use TAP space better, different categories can't find things should make better use of it. Last year at the annual meeting during the How to write an issue workshop, issues were torn apart, people take things way too personal, too much time "spinning wheels", wasting time; vibes were not good in the room. In workshops there should be factious issues as examples.
- **Gambardella** - the acoustics in the room for the first day of the meeting face to face meeting were bad. It was very difficult to follow to keep with the agenda. TAP space is a big problem.

Closing remarks:

Gambardella and Morizio thanked all again for their participation.



Area 1 Committee Meeting
May 19, 2009
Teleconference
10:00 – 11:00 pm (EDT)

Program Owner

- Fallacaro, Betsy, LTA Boston

Designated Federal Official

- Morizio, Louis, TAP Program Manager

Committee Members Present

- Deller, George
- Gambardella, Linda - Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jason, Julie
- Markman, Robert
- Morse, Cheryl
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Cabusora, Haidee
- Jackson, Robert
- Leggett, John – Vice Chair
- Stepner, Gerald

Alternate Members Present

- Bernstein, Mike
- Manjervic, Nick
- Steinberg, Jeffrey

TAP Staff

- Babb, Rose, TAP Management Assistant
- Jenkins, Audrey, TAP Analyst
- Odom, Meredith, TAP Analyst

Other Attendees

- Doyle, Connie, Specialty Programs, Attorney

Welcome/Announcements

Gambardella welcomed everyone to the call.



Joint Committee Report

Gambardella did not have anything to report this month because of a posting issue with TAP Space. The Annual TAP meeting will take place from 12/14-12/18/09 the Area chair is responsible for making dinner arrangements.

DFO Report

Morizio mentioned the upcoming face to face meeting on 6/5-6/6. He asked members to get some issues on paper for Area 1 to elevate to the joint committee. Morizio also mentioned that Jenkins has invited 3 LTAs including an Acting Brooklyn LTA as well as a few former TAP members. Morizio also informed members that they should always have their TAP appointment letter while in travel status. This letter will allow members to receive government rate when checking in hotels, and needed when entering in and out of IRS office buildings. He also reminded members to present their tax exempt forms for hotel lodging.

Recruitment - Managers and national office staff have completed ranking all applications. There were lots of applications for Connecticut and Massachusetts, more applicants than openings. There was only 1 applicant from the State of Vermont.

Estate and Trust Procedures – Connie Doyle

Form 8855 is an election of income tax when someone dies and created a revocable trust. There are several tax advantages in that. The executor of the estate and the trustee are the same for the estate since they are only filing one return.

Subcommittee Report

Subcommittee 1 - Alan Murray

Murray submitted two referrals for review and approval. Some of the issues discussed; Annual Estimated Taxes, does the IRS provides the same like NYS provides through the website. There was the question of referring people who need help with prior year tax returns to sources where they can get help such as AARP etc. Form 8855 is making progress. What happens to those tax returns, waiting to hear from a subject matter expert?

Subcommittee 2 – Cheryl Morse

Form 941 was looking to communicate issues. She wrote up Issue 5134 – Availability of Form 8109 in TAC offices. **Issue approved by consensus.**

Round Robin

Gibbons - has a gentleman working on a television spot for her. She hopes money would be available to add to programs locally and also for radio slot. There seems to be some budgetary issues surrounding how much coverage people can give and to who. There is tough time in the State of Vermont covering all of the money issues for the public. She is also working with the local public library to get the word out even though the tax season has passed.

Gambardella - will be speaking to a group of senior citizens through New York State Assembly and will have her speak to a large group at an arena.

Deller spoke to a group of 10 people and a group at the monthly defensive driving class he teaches. He also volunteered to go back to Atlanta to serve on a VITA team to refine the tax site on Publication 3189 and Pub 4012.

Garant - the town hall meeting was very beneficial, the group of law students were eager to draw upon their experience with the IRS. Visited a few vendors for operation software they are in touch with a lot of people that deal with certain tax issues from banking perspective. Attended a regional software meeting and spoke to some of the people that produce the software. They may have suggestions for people purchasing software and have to work with tax issues.



Jenkins asked Garant to email her the software vendor.

Gibbons - made several calls to different organizations since November of last year for speaking engagements. The first meeting she will attend for a speaking engagement will be June 16.

Murray - is working on a few press releases that have not been published as yet still working on it.

Markman - was in Washington, DC last week and had a meeting where he discussed IRS issues with taxpayers- confusion on payments and other things.

Public Participation

None

Closing Remarks: Next meeting June 5-6, 2009 at the Face to Face meeting in New York.



**Area 1 Committee Meeting
April 21, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Designated Federal Official

- Fallacaro, Betsy, LTA Boston

Committee Members Present

- Deller, George
- Gambardella, Linda - Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jason, Julie
- Leggett, John – Vice Chair
- Markman, Robert
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Cabusora, Haidee
- Jackson, Robert
- Morse, Cheryl

Alternate Members Present

- Bernstein, Mark
- Manjervic, Nick
- Steinberg, Jeffrey

TAP Staff

- Babb, Rose – TAP Management Assistant
- Jenkins, Audrey – Program Analyst
- Odom, Meredith – Program Analyst
- Morizio, Louis – TAP Program Manager

Other Attendees

- Puglielli, Karen – Andover, TAGM

Welcome/Announcements

Gambardella welcomed everyone to the call and complimented the members on their impressive outreach for the month.

Joint Committee Report

Recruitment – TAP put out a press release and received numerous applications to date.



TAP Chair Davidson wants all issues brought to the joint committee before they to go quality review this way, comments from joint committee will be included.

There was a Town Hall meeting in February in Little Rock, Arkansas.

The Notice Committee has cleared all their notices, all issues have been completed.

Jonathan Sabby from Area 7 has resigned for personal reasons. He did a nice job.

The IRS is going back to collecting tax liabilities rather than outsourcing to collection agencies. The IRS is also hiring additional staff.

The Annual meeting will be held in Downtown, Washington on December 14-18, 2009. The outgoing area chairs and other area chairs will be coordinating dinners this year. Like last year they will be provided with a list of restaurants to work with.

DFO Report

Fallacaro stated that this is the busiest time of the year for case advocates. A lot of taxpayers more than usual are coming in with financial hardships and needing their tax refunds more quickly. Fallacaro said she is hearing from practitioners that correspondence audits from campuses are using premature stat notices. This process is becoming very difficult.

Fallacaro stated the she will be attending the Town Hall Meeting in Albany.

The congressional meeting in Boston held in March was successful. The LITC in the area attended and TAP members Stepner, Jackson and Morse also attended. The staffers received some technical training and heads up on what is going on. The Department of Unemployment from Mass, talked about some the issues that will be seen in the field.

LTA Outreach Report

Karen Puglielli a TAS Manager in Andover sat in for the Andover LTA Stephanie Seeley. Puglielli stated that her office has 57 outreach events were planned for 2009. As new events present themselves, they are added to the office outreach plan. The events range from large scale events such as trade expo to mail out events where TAS marketing materials are sent via mail. To date, there are 32 events that have been completed of these 32 events, 26 are grassroots events. Puglielli said that 65% of the requirements have been completed for grass root events for the 2009 year. For external outreach between February and March, they have participated in three trade expos located in Boston. Each expo had the potential to reach at least 1,000 taxpayers - both individual and small businesses. There was a partnership with CISCO employees at two of the expo events. These employees joined IRS to educate taxpayers about the importance of having accurate W4s.

There were taxpayer service announcements that were aired on 14 local community access television stations. These announcements ran through filing season. One of the stations requested an on air call interview which was aired on the station. Puglielli stated that they have visited several senior citizen centers to provide TAS information as well as PLP info. One senior citizen center taped the presentation and aired it in the town Community Access Television station. Internal outreach is focused on the new hired employees. Four TAS presentations were completed during the account new management hire training program. A Case Advocate gave TAS overview on when to refer taxpayers to TAS.



Subcommittee Report-Out Subcommittee 1

Murray - that subcommittee had a conversation last week and decided to take two issues to write up a recommendation. One of the issues deals with the difficulty low income taxpayers may have in getting help with prior year tax returns at the tax offices. The subcommittee thinks that they should be referred to agencies like AARP that would provide that type of help without incurring insignificant fees. The subcommittee is writing a recommendation on that. A recommendation will also be written concerning the annual statement of payment of estimated taxes. Although the IRS does not want to mail out those statements for reasons of identity theft, it is believed it can be made available on the website. They are using the model of New York State website. Murray said that they are also looking at the issue of what happens to attachments when taxpayers send in their tax returns. The Subcommittee will be receiving information on what the IRS does with taxpayers' attachments. There were complaints that the IRS disregards that information. A subject matter expert will be contacted on other issues such as centralized appeals and Estate and Trust Returns. These issues were talked about for a while but have not been able to find a subject matter expert.

Subcommittee 2

Gibbons - Issue 5313 Electronic Filing Errors were discussed with Helen Hill and Carolyn Martin from electronic filing services. They informed the subcommittee that they will be a system change in 2010 and will be conducting a beta test with a small amount of returns. The subcommittee was asked to present specific cases in order for Helen and Carolyn to address the issue of efile errors and whether it was an organizational problem, software problem or individual problem. Issue 5314 Super Saturday one stop service was dropped as of 4/16. The committee discussed Issue 5315, Efile eligibility notification. Jenkins will be contacting a subject matter expert. Issue 5316 Estate and Trust processing time - Jenkins identified a subject matter expert and will address the Area 1 full committee.

Jenkins - someone was identified who is on the west coast he starts work at 7:00am and a mutual time will have to be arranged because of the 3 hour time difference on the east coast. He will address the full committee since both subcommittee are looking at Estate and Trust issues.

Office Report

Odom thanked everyone for providing their outreach which she has able to input into the database.

Morizio - outreach reports should be turned in on a timely basis. The outreach reports that are given to the joint committee are run monthly. There is actually a monthly and accumulative. If the outreach reports are not provided timely, they will not show up on the monthly report and will look as if we did less for that month. Keep in mind that outreach has a two fold purpose. One is the awareness of TAP which he thinks that TAP members are doing a good job getting the word out about TAP. There is evidence on the amount of applications that applicants have put in to join the panel. We have already exceeded our count from last year which was very high. The second purpose of outreach is to get good workable issues into the committee so we can work on those issues. This is something we should keep in mind and get issues from audience members when we conduct outreach.

Public Participation

Bernstein - is a member of the National Organization of Retired Federal Employees. There was a meeting last month and Deller and Bonnie Fuentes, the Taxpayer Advocate at the Brookhaven Service Center, addressed the group.

Jenkins - mentioned the Area 1 face to face meeting in New York on June 5-6, 2009 inviting the public to participate on Friday, June 5 beginning at 8:00 - 4:00 pm in the Brooklyn IRS office and Saturday, June 6, beginning 8:00-12:00 noon at the Marriott at Brooklyn Bridge. More information will be available as the meeting gets closer.



Round Robin

Deller - has an article in the Quarterly News Letter called footnotes of the Long Island Greenbelt Trail Conference. He also lead a Hike and Gripe which got good publicity, since it was mentioned in Newsday and the Quarterly News letter, but attendance was poor. Issues that came up during the hike were about software vendors. He attended the Super Saturday it was well attended by taxpayers. The issue of not doing state returns came up.

Gambardella - is working on a television show and a radio show. The television show will be done after the VITA face to face meeting. She is looking for an LTA to discuss a question and answer period with the audience. Hoping to do a joint venture with a Area 2 member on a radio at a local college in New Jersey. She attended many fundraisers during this month and is getting the word out about TAP. Gambardella said she will be interviewed by Joe Gallagher on a radio show on Saturday, April 25th.

Garant - looking forward to going to Albany this is her first major TAP event.

Gibbons - during her TAP outreach this month she met many people with hardship issues, refinancing homes, quarterly filing issues, and how stimulus monies will affect their small businesses. She is hoping to have a radio slot. There are budgeting issues regarding how much coverage people can have and to who. She is working a lot more with the public library trying to get the word out on TAP even though the tax season has passed.

Jason - there are a number of notices in the press for recruiting replacement in the State of Connecticut. She has received calls from taxpayers who are interested in becoming taxpayers.

Markman - will be on time reporting his outreach efforts from now on. Yesterday, he worked as a VITA volunteer and spoke to taxpayers whose tax returns he has prepared. During the end of tax season preparation, taxpayers were complaining about problems with their tax returns.

Murray - had a conversation with Julian Block, tax expert and former special agent of the IRS, who was quoted in the New York Times recently. He said that he was not aware of TAP and referred Murray to a few local outlets. One of the local outlets was E Magazine and that he had a conversation with the editor. The editor will be running an article that Murray wrote about TAP. Block 's observation was that despite the work that is done to by TAP volunteers to make IRS forms more efficient, taxpayers will still not get it. Murray will have more conversations with Block to get TAP more exposure.

Stepner - attended Super Saturday on March 21st at the JFK Building in Boston. Attendance was poor, 19 people were there to get help with their tax returns. 13 people consented to be interviewed for the survey. Taxpayers said unanimously that they were satisfied with the service they were from IRS Stepner thinks that going through security at the building may have affected the attendance. On April 3rd, Stepner had a meeting with the Boston EITC Coalition, nine IRS employees attended. Stepner may have a potential candidate to join the panel.

Leggett - Nina Olson had an interesting article on suggestions for improving Tax Law. Leggett had a visit with Marsha Simmons, the LTA in New Hampshire. Leggett asked Simmons what she thinks TAP can do better and Simmons told him doing outreach. Leggett thinks we should let taxpayers know the relationship with the LTAs and TAP

Closing Remarks

Gambardella - Area 1 members are making a great effort and difference. Will write up issues and send to Jenkins.

Jenkins - informed panel alternates that they have access to meeting minutes from improveirs.org but not access to TAP space website.



Next meeting - May 19, at 10am EDT via teleconference.



**Area 1 Committee Meeting
March 17, 2009
Teleconference
10:00 – 11:00 am (EDT)**

Designated Federal Official

- Fallacaro, Betsy, LTA Boston

Committee Members Present

- Cabusora, Haidee
- Deller, George
- Gambardella, Linda - Chair
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Leggett, John – Vice Chair
- Markman, Robert
- Murray, Alan
- Stepner, Gerald

Committee Members Absent

- Jason, Julie
- Morse, Cheryl

TAP Staff

- Jenkins, Audrey, TAP Analyst
- Odom, Meredith, Junior Analyst
- Morizio, Louis, TAP Manager

Public Participants

- Bernstein, Mark, NY Alternate
- Kates, David, NY Alternate
- Steinberg, Jeffrey, NY Alternate
- Manjerovic, Nick, NY Alternate

Quorum Met

Welcome & Meeting Opening

Linda Gambardella opened the meeting by welcoming all in attendance to the third Area 1 meeting of the year and thanking all of the members for their outreach efforts as well as working the issues assigned to the committee.

Gambardella expressed the importance of participation of members and thanked all for their efforts.

Joint Committee Report Out

The TAP annual conference will be held 12/14-12/18 in Washington, DC. There has been discussion as to changing the group dinners to group lunches. All members will be asked for their input.



The Little Rock town hall was a huge success. The Area 1 Town Hall is still scheduled for April 28, 2009.

TAP Chair- Charles Davidson informed everyone that EITC Awareness Day was a success.

TAP is on Face Book. There are close to 300 members to date. Be careful of viruses when connecting to Facebook.

Gambardella and John Kim have volunteered to review materials to be distributed at the 2009 Annual Conference.

Recruitment- there are new recruitment cards available, and TapSpace has all of the states where we are recruiting listed.

Sabby Jonathan and David Kahn of Area 7, conducted outreach on both a radio and TV interviews that reached 1.5 million people.

If you haven't had a chance to complete the 941 Survey please do so. JoAnn Gibbons is also on that committee and informed the committee that the survey is to gather information about why people who file Forms 940 and 941 do not file electronically. Gambardella stated she doesn't because the program she uses does not allow her to complete everything she has to manually complete some of the information.

DFO Report

Fallacaro reminded the committee of the upcoming Congressional meeting being held in Boston on March 26th, which both Cheryl Morse and Gerry Stepner will be attending.

Subcommittee Report – Out Sub Committee 1-Murray

This subcommittee is working a host of issues that are still in the research stages. The TAP staff is locating SMEs to address some of these issues.

Sub Committee 2-Gibbons

A SME addressed the subcommittee on Form 8109 and they are also working on four new issues - Issue Number 5113, 5114, 5115 and 5116.

Developed a survey to be executed during Super Saturday. Survey will be distributed to entire committee and all edits/additions should be sent to Audrey for incorporating. Final will be sent to committee for approval.

Office Report- Jenkins Super Saturday

- Please be sure to let me know if you are going to participate so I can contact the local TAC manager and LTA so they will be aware of your presence.

Outreach

- During this event we would like for the member to promote TAP as well as conduct the survey developed by Subcommittee 2.



Albany Town Hall

- The Town Hall is quickly approaching. Individuals who are interested in attending please submit your names to Jenkins.

Morizio

- Area 1 is recruiting panel members in the state of Connecticut and alternates only in the states of Massachusetts, New Hampshire and Vermont.

Public Participation

None

Round Robin/Outreach

- George-Manhattan VITA site, CBS News-Steve Hartman
- Gambardella-outreach daily with clients, AARP – fundraiser, NJ potential member, rotary club and chamber of commerce.
- Garant-one on ones, publication and news releases,
- Gibbons-Rotary club, other orgs, small business orgs, Chamber of commerce, St. Patrick's Club, VITA/AARP – free tax clinics, contacted a radio station and left a message for an interview.
- Jackson – 10 Tax Aide Sites – 75 people
- Markman – 2 VITA sites and one on ones
- Murray- one on ones, local newspaper.
- Stepner –AARP sites, North Eastern University, FEMA Seminar
- Leggett – TAC site- problems are varied and unusual and the employees have ability to adjust accounts on site. This should be advertised.
- Cabusora – conducts monthly workshops and incorporate TAP

New Issue

A large restaurant owner has employees who have 900 series which are ITINs. Gibbons mentioned that her SBSE Issue committee may have done some work on this issue. Jenkins will research. The employer is withholding tax but is not paying tax.

Closing Remarks

Everyone is doing a great job and keep up the good work.

Next meeting will be on 4/17/09 at 10:00am.



**Area 1 Committee Meeting
February 17, 2009
Teleconference
10:00 – 11:00 pm (EDT)**

Program Owner

- Fallacaro, Betsy, LTA Boston
- Spisak, Jim
- Fett, Robert

Designated Federal Official

- Morizio, Louis

Committee Members Present

- Deller, George
- Gambardella, Linda
- Garant, Felicia
- Gibbons, Jo Ann
- Jackson, Robert
- Jason, Julie
- Morse, Cheryl
- Markman, Robert
- Murray, Alan
- Stepner, Gerald

Alternate Members Present

- Steinberg, Jeffrey

Committee Members Absent

- Cabusora, Haidee
- Leggett, John

TAP Staff

- Babb, Rose
- Jenkins, Audrey
- Odom, Meredith

Other Attendees

Welcome/Announcements

Gambardella welcomed everyone to the call.



Joint Committee Report

Not much to say about the joint committee meeting, the public did not participate it was more of an administrative type of meeting. The upcoming meeting would be more informative to come back with more areas to discuss. The meeting was posted on TAP space and joint committee was posted as well. It was just about introductions and explanations. Talked about our annual in August no spot was picked.

DFO Report

Betsy will be hosting a congressional staffer meeting in Boston, at the JFK building on March 26th; members in the area are invited. All Local Taxpayer Advocates will be in Washington, DC next week to do congressional visits and make rounds to the house and delivering Nina's report to congress.

What's going on in the field?

Fallacarro said that this is a busy time of the year, as taxpayers file their returns, there are hardship cases people who need their refunds quicker, they may be offset because they owe taxes. Remember that when you are out in the field. There are some problems in the field because of the economic stimulus payments. There have been problems with filed returns. For those of you doing tax prep, there may be some questions on that. People, who did not receive their stimulus payments, need to claim it, where did the IRS put it? The IRS is still struggling with some of those issues on how to get those payments corrected that weren't made properly last year.

Betsy received notification that she will be rotating off of TAP. There will be an announcement as to who will be the new DFO.

LTA Outreach Report

Fett- LTA in Burlington, VT portfolio contains TAC former walk in office. This is the middle of filing season, and people are coming in to get returns prepared. Electronic filing by taxpayers was started since the first week in February. Free filing services are offered to the public, there are some qualifications such as \$42,000 is the income limit it is also the qualifications for EITC. They are referring taxpayers to the VITA and TCE sites if they cannot assist them in the office directly. An appointment system is set up and appointments are made up to 5 days in advance.

Some categories have been added for tax return prep this year. TAC uses a list to determine whether it is in scope for tax law questions or still for return prep. They may be able to answer tax law questions, but still cannot prepare the tax returns. There is also a limit that TAC on the type of questions they can answer or prepare. The terminology is scope or out of scope. This can be frustrating for the individuals. Some of those questions brought to TAC prepares are: Capital Gains Sched D most common one, they can answer questions on Capital Gains Sched D, but are not able to prepare the return for the taxpayers. This is difficult for seniors who are living off of investment income. Schedule D, Dividend Income returns will not be done but for interest income would be done. Fett is hoping to get this changed. Debt cancellation, Homebuyers Credit and Mortgage Forgiveness Relief Act was added, and will be prepared.

Majority of walk in offices will take cash. In some locations it poses a problem since all monies have to be deposited with 24 hours. All walk in offices now have a safe they keep the cash and prepare all the documentation that goes with it in the safe. A courier service will come at a schedule time and take to a designated financial institution.

Financial distressed taxpayers are an emphasis for field assistance as well as the other divisions of the IRS they are trying to be sensitive to this. They have added cancellation for debt and the mortgage forgiveness act to their profile for return prep. Field assistance walk in sites can also act in lieu of our automated collection system so they can handle collection issues as well.



Outreach efforts

Fett - press conference at the State House co-hosted with SPEC, a state senator, state treasurer, state representative, and assistance from loan income community. All major news organizations covered it along with TAP representatives. Was interviewed by CBS on a 30 second sound bite it did explain how the taxpayers' service is available to the public and it was quite successful.

Spisak and Alan Murray did an outreach in Westchester it was eventful. Murray received an issue of substance will talk about it in the next Subcommittee 1 call. The EITC outreach was last minute. There was a Mayor's press conference. The NYC EITC campaign saves program encourages people to save part of their EITC in a bank account that pays interest with a minimum of \$50 and a maximum of \$500 if left for at least 4 years the NYC saves program matches it 50%.

Subcommittee Report:

Subcommittee 1: Chair Murray - met February 10th, with Keith Wallace from IRS E Services to address the issue of registering every 6 months for E services support. The subcommittee is working a combination of the trust and estate returns to bring to the committee. At the outreach with Spisak, a taxpayer said that when he attached a statement explaining why his return was filed late, the IRS disposed of his statement and sent him a letter asking him for an explanation. **Jenkins and Odom will secure a subject matter expert to explore this.**

Subcommittee 2: Jenkins - met on February 3rd, Bonnie Fuentes LTA of Brookhaven addressed TAP members on correspondence audit. She gave informative information. Leggett will speak with her on an issue he brought forth to see if the issue is isolated. Subcommittee 2 is also working on the issue of availability of deposit of payroll taxes headed up by Morse. She also brought up the issue of filling the returns electronically, one of the previous Area 1 members brought forth as well.

Office Report

- Jenkins said that two outreach spreadsheet emails were sent out. Feel free to use either one and send to Odom monthly.
- TAP space will be our main source of communication, our emails will be shorter and fewer. The link to TAP space will be emailed to TAP members since there has been some problems getting into the site. Members should make sure they go into the biography page first.

Committee issues

Starting in the month of March, Odom and Jenkins will be attaching a list of issues that members can review and select which additional issues they want to work within subcommittees.

Face to Face Meeting (6/4 -6/6)

The recommendations for the face to face meeting are for Brooklyn, New York. Louis has made that recommendation and according to the TAP budget, we are waiting on the final approval. Thursday, June 4th is the travel day; meet all day, Friday, June 5th and on **Saturday** June 6th, meet half day and travel home. Meeting will be held in the Brooklyn office on Friday and we are looking to secure outside space for the half day Saturday.

Round Robin

Deller plans to hike on 4/15 will be in the Long Island Greenville Trail News Letter. Will take anyone who wants to come along to give ideas how to improve IRS.

Gambardella did some outreach in a magazine called Riverton, in Rockland County. Got some nice results and also some public speaking engagements from the article. Also did another outreach for a Lions Club and got another booking for more public speaking. The article talked a lot of TAP will send article to Odom.



Garant heard from LTA but, haven't made any plans but, discussed one press release that they hit the largest circulated newspaper in Portland, ME.

No issues as yet, did several one on ones but nothing yet.

Gibbons did a press conference in Vermont state capital was very helpful to get an understand on who is who. Got a few good leads out of that with people she followed up with. Right now, trying to coordinate and schedule things to do with one on one time. She is putting together a list of speaking engagements for the next few months.

Jason gave a presentation to a group called Connections 30 people, on January 7, and on February 9th gave a presentation to Staff for seniors' center a group of 30.

Markman said the national conference of CPA practitioners had their quarterly, meeting of the entire organization he gave a presentation to about 60 CPAs and was also asked to give a local presentation at a local church.

Morse said that there was not much in January and that she will be a keynote speaker next Friday, February 27th. Put out the TAP Press release to her local paper.

Stepner said that on March 12, he will be attending a meeting; He will have a chance to spread the word and on March 25th will be attending a civil meeting close to his home before a group of 30 – 40 people.

Murray also has been working with a reporter from the local newspaper in Westchester. The reporter who was interested in a press release and has contacted him a number of times He believes something should be coming out soon.

Closing Remarks: Gambardella - look forward to next month's meeting and a wonderful season with the work that is being done especially regarding outreach.

Next meeting will be March 17, at 10am EDT.