



2004 Meeting Minutes Area 2

- September 7, 2004
- August 3, 2004
- July 13, 2004
- May 4, 2004
- March 2, 2004
- February 3, 2004
- January 6, 2004

Area 2 Committee Meeting Minutes

Date: September 7, 2004 (3:00 PM – 4:30 PM ET)

Via: Teleconference

Roll call was taken and quorum was met;

Quorum=8

13 Members and the Acting Designated Federal Official (DFO) were present on this call.

Designated Federal Official (Acting)

- Eileen DeLeo, TAS Senior Analyst (Assigned by DFO Terry Mapp)

Panel Members Present

- Mary Balmer, NC
- Richard (Dick) Bobb, NC
- Anthony DiMartino, Co Vice-Chair, NJ
- C. Morgan Edwards, NC
- Jerry Gensiejewski, Jr., PA
- Calvin Johnson, VA
- Karen Kerrigan, VA
- Robert Maziarz, NJ
- Patrick McCombie, DE
- David L. Meyer, CHAIR, NJ
- Theodore Perros, D.C.
- Agnes Tillerson, PA
- Faith Vinikoor, Co Vice-Chair, MD

Members Not Present

- Leonard Steinberg, NJ

TAP Staff

- Inez E. De Jesus, TAP Program Analyst (Scribe)
- Nancy L. Ferree, TAP Program Manager



Welcome/Announcements/Review Agenda

Chair David L. Meyer opened the meeting by extending a warm welcome to Agnes Tillerson who was recently reassigned from Area 3 to the Area 2 committee.

Chair stated that this will be the panel's last meeting for this fiscal year, and since some members like him will not be returning for the new term that commences in November 2004, he looks forward to the committees' continual good works.

Chair shared that the Joint Committee met a couple of weeks ago and most significant issues were tabled for discussion during their face-to-face meeting in Denver this week.

Review/approve meeting minutes of August 3, 2004

Minutes as presented were approved unanimously.

Review all Action Items from Previous Meeting

Inez provided an account of all action items from the previous meeting as follows:

- **On Page 2**-top of page, Steinberg will forward to Karen Kerrigan the email from Mary Ann Delzer requesting feedback and suggested agenda items for the upcoming annual meeting. Current Status: Karen indicated that she had not received it; this email was forwarded to Karen right after this meeting. (Complete)
- Bottom of same page, agenda items for Joint Committee's face-to-face meeting should be brought to the attention of David or Leonard. Current Status: Assumed that this has been done by now.
- **On Page 3**-top of page, Inez is to inquire on "What outside focus groups are being used by the IRS to review revised forms and /or publications". Status: On August 26, 2004, response received from the subject matter expert was shared with the entire committee and DFO by email.
- Further down on Page 3, "Evaluation Survey on Lessons Learned During the Past 2 Years" has been tabled to the September 7, 2004 meeting.
- Bottom of same page, Nancy Ferree drafted the response to the Practitioner from Maryland, Issue # 3139; after sharing with the committee and receiving approval, the letter was mailed on September 1, 2004 and issue was closed.
- **On Page 4**- McCombie is to finalize draft recommendation on "Simplifying Form 1041" by using examples. Current Status: Completed.
- **On Page 5**- Regarding Issue # 3123, Improve Payment System, Action item for Inez to inquire if this is related to a systemic problem. There was no indication on the SAMS system, and Tony DiMartino spoke to the Citizen from Maryland who is blind and learned that the relative that had prepared the tax return had made an error by using his or her own social security number. This issue was closed on August 19, 2004. DiMartino confirmed his dialogue with the citizen and felt that IRS had done the right thing.
- **On Page 6**, top of page, Publication 4255, IRS Tax Help Insert, Update since last meeting: Program Manager Nancy Ferree shared that this insert is a document used primarily by IRS employees and perhaps Practitioners. This insert lists the phone numbers and web addresses of the major units within the IRS. The Taxpayer Advocacy Panel's toll free number is listed but not the website. Ferree has communicated with the originator of this document and he will be adding the TAP website to this document when it is revised.
- **On Page 6**, bottom of page, Inez is to ensure that the Area 2 panel members' receives copies of the IRS Strategic Plan 2005-2009- these were mailed out on August 27, 2004.

Review "Draft" Recommendation- Simplify Form 1041 Instructions- Meyer turned this portion of the meeting to the Form 1041 Sub-committee Chairperson, Patrick McCombie. McCombie inquired if everyone had had time to review the latest draft. Responses received indicated agreement that the final revision was well done.



Faith Vinikoor pointed out the following that needs to be corrected:

1. The correct title should be "Simplify Form 1041 Instructions" and not "Simplify Form 1041 & Instructions," and
2. On Page 4 of the document, there appeared to be no consistency with the terminology face-to-face with hyphens.
3. Same paragraph, second line from the end, the word "comment" should be plural.

When the motion was made to elevate this recommendation to the Joint Committee, there was no opposition. Agreement was made that once Inez makes the corrections just referenced, she is to send it to the Joint Committee's Program Analyst Barbara Toy so that it may be reviewed during the upcoming Joint Committee's face-to-face meeting in Denver, at the end of this week. (This was done as recorded)

Review Evaluation Survey on Lessons Learned/Guidance for Future TAP Committees- Chair inquired if everyone had had time to review the summary that was recently circulated to all. He said "this was a great job"! This portion of the meeting was then turned over to Dick Bobb. Dick Bobb began by stating that he has had lots of experience working with volunteer groups and strongly believes that the Chair should assign work to the volunteers, and it is up to the individual to say "no" if he or she cannot handle the task.

He also stated that he has not attempted to make any conclusions out of this survey which ten members responded to, and in general he gives the committee a high mark for getting along well, and a low mark for lack of participation and lack of following up. Also, legislative issues were discussed too much. This led to the following dialogue among the panel members:

- DiMartino recalled that over a year ago, when the 1041 issue was first being reviewed by the sub-committee, and he submitted feedback on his experience in attempting to fill out the form, he never received follow-up or feedback to his remarks.
- Vinikoor mentioned that there is no special training for the leadership positions.
- Meyer stated that this is a volunteer organization and in his opinion the committee is not giving itself credit for the dedication shown and the accomplishments they have made within the past two years. The tax process is very unclear and hard to understand. Meyer commends this committee for what it has done and feels they should be proud of. He went on to express praise to the sub-committees and their efforts. Also, he stated the responsibility is to the individual members.
- Meyer also stated that the Joint Committee is aware of the growing pains during the past two years and how the committees function and are utilized.
- C. Morgan Edwards used the parable of moving a mountain by using a sand shovel as an illustration of what this advisory group is attempting to do in relation with its mission.
- Kerrigan shared her observation since she is the Vice-Chair, SB/SE Compliance, Schedule C Non-Filers Issue Committee, and they too had similar frustrations. Also, she feels that face-to-face meetings helped in getting things done as opposed to teleconference meetings. Within the issue committees, you already have the ears of the IRS via the Program Owners; it's harder with the area committees.
- Dr. Perros stated he was impressed by the dedication of all, and requested a round of applause for those members that will be leaving.
- DiMartino gave Meyer the highest praise for his leadership and guidance during the past year. DiMartino shared that he is retired and does not understand how anyone can still hold a job, have other responsibilities, and still volunteer with TAP.

Summary: David proposed, and it was accepted, that the "lessons learned" by this committee be incorporated with the Committee's Annual Assessment report. He had questions and requested



clarification from Inez on the quantifiable data listed in the summary on the number and type of issues received by this committee.

Action item for Inez & David:

- Inez will provide David with a specific breakdown of total issues received, total number of issues elevated to the Joint Committee, number of legislative issues, issues that were beyond the TAP Mission, etc.
- David will be submitting portions of the "Survey Summaries" with the Annual Assessment Report to the Joint Committee that is due by October 15, 2004. (This information will be shared with the committee)

Committee's Annual Self- Assessment Report

As previously discussed, Chair summarized that revisions to the "Lessons Learned" report will be incorporated into the annual self-assessment report since most of the committee's thoughts are reflected in the summary.

McCombie made the suggestion of perhaps capturing and using "Success Stories" and Ferree shared that the TAP National Office staff is already working on this with the "Communication Strategy". It's in the works.

Ferree also mentioned that there is a Summary of TAP Recommendations made available by the Joint Committee to the Chairs on a monthly basis. Agnes Tillerson stated that this should be shared with all. Update: On September 9, 2004, Inez sent an email to the entire committee with a link to TAP Speak, <http://tapspeak.fedworx.org/> where this and other similar reports are posted periodically. Inez also requested from the panel, to let her know if they wanted a specific report downloaded and copy sent to them.

Request to Change TAP Name Issue (Issue # 3141)

DiMartino shared with the panel his conversation with Mr. Abramowitz, Citizen from Maryland, who made this suggestion. Mr. Abramowitz had experienced confusion with TAP since the name is so close to TAS, Taxpayer Advocate Service.

- Balmer shared that it has been her experience also when doing outreach, of encountering the same confusion from the citizens/taxpayers.
- Meyer recalls that this has been discussed during Joint Committee meetings.
- Ferree also shared that on the TAP Toll-Free line, we constantly get phone calls from those who are trying to get in touch with TAS.
- Vinikoor made an inquiry on whether changing the TAP name comes under the jurisdiction of the National Taxpayer Advocate or the Department of the Treasury.
- Ferree believes that this is on the TAP Director's radar screen. (There is strength in numbers)
- Morgan reminded everyone that the name had been changed in 2002 from Citizen Advocacy Panel (CAP) to Taxpayer Advocacy Panel.
- Meyer asked DiMartino if he would like to take this to the new panel in November 2004. Agreement was made that this is a good proposal, and that perhaps it may be included in the Annual Assessment Report. Action Item: DiMartino volunteered to prepare "draft" recommendation "Requesting Change of TAP Name" and will be circulating among the entire committee as soon as possible.

Outreach Efforts

C. Morgan Edwards shared that on September 1, 2004, he met with the North Carolina Local Taxpayer Advocate and two members of her staff with the goal of defining an outreach process for the Western North Carolina area and maybe the state. Agreement was made to try to use second tier print media



to tell "our story". Morgan stated that he is willing to represent TAP and Inez will be supplying him with TAP Marketing supplies.

Review of New Issues & Wrap Up of "Old" Issue(s)

Inez shared that there were no TAP related issues received.

In regards to Issue # 2389, "Improve Communications to Taxpayers"- chaired by Dr. Perros, will be carried over for the new panel in November 2004.

At this point, Morgan brought to the panel's attention, his concern regarding existing problems with church organizations.

- This led to brief discussion whether these were legislative in nature.
- Ferree reminded everyone of the TAP Mission statement.
- Perros agreed with Morgan that the panel as advocates should keep issues like these under their radar screen.
- Balmer shared that the Senate Finance Committee is aware of issues involving non-profit organizations as well as IRS Commissioner Mark Everson and as a result, there has been an increase in audits recently.
- Meyer suggested that since Morgan is one of the panel members that will continue in November, that perhaps he can bring his concerns to the new panel for their consideration.

A "Few Words" from the Staff

Nancy thanked everyone specifically those who are leaving for their commitment and dedication. She shared that "thank you" letters and certificates are forth coming from the National Office to those who are currently leaving. She also stated that the first year is one of learning and that the committee should not be too hard on themselves. "This has been a learning curve for all of us."

Inez followed by expressing her appreciation specifically to Mary and David whom she has worked closely with within the past two years.

Dr. Perros also shared his appreciation for those who are leaving and informed Mary and David that they will be greatly missed. "Please keep in touch." Appreciation towards the staff was shared at this time as well.

Public Participation/Input

None

Closing Assessment

Before closing the meeting, Chair Meyer shared that he believes this panel had its highs and lows but despite it all they maintained respect for one another, and put forth their best efforts. He reminded everyone that the U.S. tax laws and collections process is a complicated system but it is his personal belief the IRS is the foremost tax processing agency in the world and, is the agency on which other countries seek to model their own tax agencies.

He also expressed his appreciation to everyone including the staff and informed all to keep his phone number and email address available and that he would be more than happy to hear from you and to be of any assistance.

Meyer wished much success in the future to the new in-coming panel.

Meeting was adjourned by Chair Meyer.



Note: There will be no October 2004 Meeting;
Orientation for New Members, November 3, 2004, 1:00 -5:00 PM (tentative time slot) in D.C.
Annual Meeting: November 4-6, 2004 in D.C.



Area 2 Committee Meeting Minutes
Date: August 3, 2004 (3:00 PM – 4:30 PM ET)
Via: Teleconference

Roll call was taken by TAP Program Analyst Inez E. De Jesus
Quorum=8

Quorum was met; 8 members and the Designated Federal Official (DFO) were present on this call.

Designated Federal Official (Acting)

- Terry L. Mapp

Panel Members Present

- Mary Balmer, NC
- Richard (Dick) Bobb, NC
- Anthony DiMartino, Acting Chair, NJ
- Karen Kerrigan, VA
- Patrick McCombie, DE
- Theodore Perros, D.C.
- Leonard Steinberg, NJ
- Faith Vinikoor, Co Vice-Chair, MD

Members Not Present

- C. Morgan Edwards, NC
- Jerry Gensiejewski Jr., PA
- Calvin Johnson, VA
- Robert Maziarz, NJ
- David L. Meyer, NJ

TAP Staff

- Inez E. De Jesus, TAP Program Analyst/Scribe
- Nancy L. Ferree, TAP Program Manager

Welcome/Announcements/Review Agenda

Anthony DiMartino opened the meeting by welcoming everyone and by announcing that he will be chairing today's meeting since David Meyer is on vacation.

Joint Committee News

DiMartino shared the following information based on the Joint Committee's July 20, 2004 teleconference meeting (and at times DiMartino relied on Steinberg since Steinberg participated on this call):

- TAP Director has requested that TAP have no meetings in October 2004 since the staff will be busy preparing for the national meeting in November, and a number of panel members will not be available since their term ends on September 30, 2004.- Steinberg stated that he

believes that he and Bob Meldman are the only chairs that are not remaining. In addition, the chairs terms have been extended to include the national meeting.

- The Joint Committee will have a short meeting in October and Barbara Toy will soon be sending out an email on the annual meeting.
- Program Manager Nancy Ferree clarified that an email had been sent out to all panel members from Mary Ann Delzer requesting feedback and suggested agenda items from all members regarding the upcoming annual meeting. Calendar notes for members staying for the third year are annotated in this email. Steinberg found the email and read it to all, and promised to send it to Karen Kerrigan who had indicated she had not received it. **Action item for Steinberg: to forward this email to Karen Kerrigan.**
- DiMartino also shared that a draft exit interview form is being discussed and reviewed by the Joint Committee.
- The Joint Committee has requested that the Program Managers inform the analysts to start tracking their issue committee's recommendations and perform any necessary follow-ups.
- DiMartino inquired if anyone had not received the TAP Annual Report and there was no response. Leonard expressed his appreciation to Patti Robb, Milwaukee Office TAP Secretary, for preparing the TAP Annual Report for publishing.
- The message on the Refund Check Envelope was briefly shared with the panel.
- One of the Joint Committees' action items is to change the name of Earned Income Tax Credit Committee (EITC) to Earned Income Credit (EIC) Committee.
- The Outsourcing Tax Preparation Issue proposed by Area 3 with one member objecting and submitting a minority report led to a discussion among the Area 2 committee. Perros shared that the television program "60 Minutes" recently had a feature on Outsourcing. Steinberg shared that during the Joint Committee meeting that he, and Bob Meldman shared their views that this is not within the TAP's mission and also David Meyer had expressed that this issue was getting close to being legislative and would require a legislative regulatory change.
- DiMartino inquired what was meant by "What's on TAP"- and Nancy responded that it is a newsletter created by Area 4 and it is being considered to be used nation-wide or area by area.

Steinberg requested that "if you have any issues you want to bring to the Joint Committee's attention" for when they hold their face-to-face meeting in Denver in September, please bring them to David or his attention. **Action item for the entire committee- agenda items for Joint Committee's face-to-face meeting.**

Review/approve meeting minutes of July 13, 2004

The minutes were approved unanimously.

Review all Action Items from Previous Meeting

Inez reported the following updates:

- On Page 3, DFO Mapp requested that the committee allow time for the staff to obtain information on what outside focus groups are being used by the IRS to review revised forms and/or publications. **Still an open action item for Inez**— Inez shared that she has made inquiries and is awaiting a response.
- On Page 5, The "Evaluation Survey-on Lessons Learned during the Past 2 Years-that May be Shared with Future TAP Committees" project coordinated by Dick Bobb, which entails a summary of responses received by this committee and the preparation of a draft recommendation to be elevated to the Joint Committee has been tabled to the September 2004 meeting. **Still an open action item.**
- On Page 5, "to add Publication 4255, IRS Tax Help Insert, to the August 3, 2004 teleconference meeting agenda has been done.

- On Page 6, TAP Communication Strategy, done, Inez did re-send the June 16, 2004, email to the entire committee, requesting that they review and forward their responses directly to the Chair by no later than July 19th.
- On Page 6, Response to Congress-Simplify Tax Code, done, this subject matter was added to the August 3, 2004 meeting agenda.
- On Page 7, for the record, 1) Mr. Weinstein did send as promised the specific information regarding the Notices and the telephone numbers referenced on each notice that he had referenced earlier. 2) Inez shared that she was able to do some research and concludes that Mr. Weinstein's concerns are related to the "Toll Free Automated Routing Process". She explained how the assistors reached on the IRS' toll free numbers are not always available to address issues immediately based on their expertise. Tony DiMartino stated that just recently he had this experience and that after his call was routed accordingly, he received the assistance he needed. 3) Inez also referenced the IRS Strategic Plan for 2005-2009 and the National Taxpayer Advocate's 2002 and 2003 Report to Congress which addresses how the IRS has on its radar screen ways to provide improvements in the area of "providing tools to ensure accurate, timely and accessible responses to tax law and account issues and inquires" are made. 4) Vinikoor made an inquiry on what specifically was the Practitioner looking for and DFO Mapp responded that she had a copy of the letter he sent to Inez and it seems that he wanted to be able to reach someone immediately on the toll free number that could address his issue. 5) **New action item as the result of this discussion: TAP Program Manager Nancy L. Ferree will prepare response to the Practitioner from Maryland and then share the draft response with the committee chair, and panel for their approval.** (Issue #3139)
- On Page 7, the update - face-to-face meeting has been added to today's meeting. (Done).

Status Report(s) from Sub-Committee Chairs

McCombie reported on the issue, Simplifying the Form 1041, and stated that since the last meeting he distributed draft among the sub-committee members and had received responses back from DiMartino and Vinikoor. Vinikoor asked for additional information. Ferree responded to a question McCombie had related to the TAP Mission Statement: "if the committee makes a recommendation to the IRS, the staff conducts the research if needed, and the committee does not have to tell the IRS how to do it. The IRS evaluates the recommendation and gives it to the appropriate program owner."

Faith suggested that examples be used. McCombie stated that within a week or so, a draft will go out and the next step will be to present it to the entire committee. **Action item for McCombie.**

Outreach Efforts

Nancy Ferree stated that she will be sharing outreach opportunities with the DFO, Committee Chair, and Panel. She suggested it would be a good practice for the panel to contact their local Taxpayer Advocate Service offices. Most advocates are aware of TAP and its mission. If assistance is needed from the staff, please don't hesitate to do so. It is the staff's responsibility to make sure that outreach opportunities are made available to the panels.

Nancy shared that the following are upcoming events, and if there is an interest from any Area 2 member, please let it be known to her or to Inez:

- IRS offers Practitioner Seminar-in Spartanburg, SC, on September 21, 2004.
- "Working Together Conference"- is a partnership of public and private tax professionals in which practitioner groups jointly sponsor an annual conference with IRS and the PA Department of Revenue. September 24, 2004.



Leonard Steinberg shared that on August 23, 2004, he will be attending the National Association of Enrolled Agents (NAEA), New Jersey Chapter, meeting in Springfield, NJ, whereby he will also be addressing TAP.

Inez reminded everyone to please keep her informed of their outreach activities so that it may all be captured in the committee's annual report.

Review of New Issues

Inez read the new Issue #3123, which had been received on August 3, 2004, from a Citizen from Maryland:

"Taxpayer said he got a notice that he had made an error on his tax return and that he owed money. He sent in a payment, but two months later he got another notice saying that he still owed the money. It took over two months for the payment to get posted to his account. This is very stressful and causes a lot of frustration. The system needs to be fixed. He also feels that the name Taxpayer Advocacy Panel is too close to Taxpayer Advocate Service and causes confusion. The Panel's name should be changed." (For the record, since this issue had 2 separate suggestions, a separate number has been assigned to the TAP Name Change, # 3141.)

This led to the following dialogue among the members:

- Steinberg: "Did the taxpayer send check by certified return receipt"? Steinberg shared that he recommends to his clients that they do so.
- Taxpayers sometimes get notices from the IRS stating that payment was not received but the bank shows that the IRS did cash the check.
- Recent New York Post article stated that many banks will only give you a copy of the front part of the check and not the back part of the check which has pertinent information that the IRS needs in order to trace a payment.
- At one point, Program Manager Ferree reminded all that focus should be on TAP's mission and not on advising banks how to operate.
- **Action item for Analyst De Jesus:** Ferree asked: 1)" How many of these type of calls or issues are we getting? " Research is required- statistics are needed- we can not react to just one call. DFO Mapp stated that these statistics are available. 2) Did the taxpayer place his or her social security number or employer identification number on the check and indicate which period he or she wanted it applied to? DFO Mapp stated that in order to do a "payment tracer"- the front and back of the check is what is used. In the Taxpayer Advocate Service Office, this is how problems like these are corrected and resolved.
- Dick Bobb stated that a taxpayer should not have to pay extra monies to send mail/checks by certified return receipt.
- Vinikoor asked "How is the IRS to know what is in an envelope?".
- It is not always an IRS problem. This may be an isolated incident.
- **Conclusion:** DiMartino volunteered to respond back to the taxpayer.

Response to Congress – Simplify Tax Code

Vinikoor stated that she would pass on this for now. Primarily she has a question for Chair David Meyer on this matter which she will follow-up on. For the record, Nancy Ferree had shared with the committee "Legislative Affairs Tidbits" for the week of May 31, 2004. It detailed the following:

"The House June 2 passed (418-0) H.R. 4109 which requires the IRS to develop a new simplified tax form for use by taxpayers age 65 or over. Seniors would be allowed to use the new form regardless of their taxable income and would be able to report Social Security benefits, distributions from a qualified retirement plan, annuity, or other deferred payment arrangement, interest or dividends, and capital gains or losses on the new form. The form would be available for tax year 2005."



Publication 4255, IRS Tax Help Insert

Steinberg requested that this issue be tabled till next month's meeting. **Action item for Inez: carry-over to next month's agenda.**

Update on Face-to-Face Meeting

Nancy shared that at the request of Chair David Meyer (while Inez was on vacation) she sent an email out to the entire committee requesting feedback regarding:

1. Interest in having a Area 2 face-to-face meeting,
2. Preference for a location for the meeting (previous location was Washington, D.C)
3. Availability to attend the face-to-face meeting
4. The preferred date, at this point, the target date is August 27 and 28, 2004 — travel on the 26th and the 28th
5. Notation, that if we are not able to get a quorum, we will not be able to hold the meeting

Responses received indicated that the majority said yes and were available, but she wanted to share the following information: DFO Mapp, Analyst De Jesus and Nancy Ferree are not available to attend during these dates. She questioned whether a face-to-face meeting could be coordinated within such a short time frame. She had looked at the TAP Master Calendar, and took into consideration that many members will be attending their issue committee face-to-face meetings.

Vinikoor inquired jokingly if it would be possible to get brownie points for next year and have a face-to-face early in the year and another one later on. This was followed by a comment from Perros, "does TAP give out bonuses".

Conclusion: Timing is not good now. After discussion among the members, it was agreed upon by consensus, that they will pass on holding a face-to-face meeting and believed that business can still be conducted via teleconference meeting. No one opposed.

News from the Staff

Inez informed the committee that the IRS Strategic Plan 2005-2009 has been ordered for all, and that if anyone did not want to receive the hard copy to please let her know. Based on no responses received, DiMartino reaffirmed that Inez will be sending publication out to all as soon as the order arrives. **Action item for Inez.**

(On August 2, 2004, Leonard Steinberg had sent out the link to all when the IRS Strategic Plan was announced: <http://www.irs.gov/irs/content/0,,id=101098,00.html>)

Nancy shared that from now on the staff will be fully involved with the coordination of the Annual Meeting. She reminded everyone that if they had any issues they wanted added to the agenda to please respond to TAP Program Manager Judi Nicholas' email since Ms. Nicholas is the contact person.

Public Participation/Input

None

Closing Assessment

The "Evaluation Survey" project has been tabled till the next meeting.

DiMartino asked the panel whether anyone else besides Faith and himself have had the opportunity to participate with the interviewing of prospective new panel members. He went on to share that the quality of the candidates was excellent and he found himself hard-pressed to make a choice. He was very impressed with the caliber of the candidates.



Perros asked Steinberg in reference to the Joint Committee's Chicago meeting Leonard had shared information on before, and the W-4 issue that the Payroll Taxes Issue Committee is currently addressing, that he strongly believes there should be a "**Standing Committee to Review IRS Forms and Publications**" and that it be made available for new panel members. Steinberg responded that the TAP Director, Bernie Coston, supports this idea. Leonard reminded everyone again to please share their ideas. DiMartino said he endorses this concept as well. This also relates to Issue #2389, "Improve Communications to Taxpayers" which Perros has brought to Area 2's attention.

When Perros made a statement about a large sum of delinquent taxes that are not being collected, Ferree responded that when you look at all reports either from the Commissioner of the IRS or from the National Taxpayer Advocate, all resources are going to "Enforcement".

DiMartino thanked everyone for their participation and to the staff. DiMartino also confirmed next meeting: September 7, 2004 at 3:00 PM ET — it was also noted that this will be the committee's last meeting for this fiscal year.

The Area 2 Committee reviewed and approved these meeting minutes by consensus on September 7, 2004.



Area 2 Committee Meeting Minutes
Date: July 13, 2004 (3:00 PM – 4:30 PM ET)
Via: Teleconference

Roll call was taken by TAP Program Analyst Inez E. De Jesus

Quorum= 8; quorum was met, 9 members and the Designated Federal Official (DFO) were present on this call.

Designated Federal Official (DFO)

- Terry L. Mapp

Panel Members Present

- Richard (Dick) Bobb, NC
- Mary Balmer, NC
- Anthony DiMartino, NJ, Co Vice-Chair
- C. Morgan Edwards, NC
- Karen Kerrigan, VA
- Robert Maziarz, NJ
- Patrick McCombie, DE
- David L. Meyer, NJ, Chair
- Theodore Perros, D.C

Members Not Present

- Jerry Gensiejewski Jr., PA
- Calvin Johnson, VA
- Leonard Steinberg, NJ
- Faith Vinikoor, MD, Co Vice-Chair

TAP Staff

- Inez E. De Jesus, TAP Program Analyst/Scribe

Guests

- Ray Weinstein, Practitioner from Maryland

Welcome/Announcements/Review Agenda

Chair David Meyer opened the meeting by welcoming everyone.

Joint Committee News

None

Roll-Call & Confirmation of Quorum *(8)

For the record:

- Manning H. Mosley III resigned on June 1, 2004, and Robert Taylor resigned on June 27, 2004



- April 6, 2004 teleconference meeting was cancelled since the Federal Register Notice did not post timely, and the June 11, and June 12, 2004 face-to-face meeting scheduled to take place in D.C., was cancelled due to June 11th being declared a National Day of Mourning for Former President Ronald Reagan.
- TAP Program Manager Nancy L. Ferree and Panel Member Faith Vinikoor will not be present on this call since they are both conducting interviews for in-coming TAP Members that will begin their term in November 2004.

Review/Approve Meeting Minutes of May 4, 2004

The minutes were approved unanimously.

Review all Action Items from Previous Meeting

1. On Page 2, "Committee will review their "Operating Procedures" during the next meeting to see if any changes need to be made." This is an agenda item for today's meeting.
2. On Page 3, "The Committee is to share with Leonard Steinberg which issues they would like discussed at the Joint Committee's face-to-face meeting, and Inez is to share with Leonard, the Chair's reports on "what committee has done and what are their goals." This was accomplished by May 7, 2004.
3. Page 4, "Regarding Lessons Learned & Roadmap for Future Area 2 TAP, Dick Bobb will be providing input for the draft agenda. Chair Meyer has some ideas he wants to bring forward and he will make sure these are included in the draft agenda." Done, and also an agenda item for today's meeting.
4. Page 4, "Inez is to annotate the changes on TAP Master Calendar and inform all parties concerned that the July 6th teleconference meeting has been changed to July 13, 2004." Done!
5. Page 5, "Dick Bobb will be providing input for the portion of the meeting agenda for the face-to-face meeting scheduled for June 2004, on the 'Recap Committee's Successes/Activities over the past 2 years and Lessons Learned.'" Done!
6. Page 6, "In response to Issue # 2808, IRS's Employee's Email & Direct Number Be on Notices, Vinikoor volunteered to prepare the response to the Practitioner." On July 9, 2004, letter approved by the Chair was mailed to the Practitioner and issue placed in "Parking Lot" status.

Status Report(s) from Sub-Committee Chairs

Patrick McCombie reported that he had sent out an email to the Form 1041 subcommittee team earlier today, and was awaiting feedback from them.

Balmer made some inquiries about this and McCombie responded that the subcommittee was still addressing two proposals, his portion is considering changing the instructions, and that Faith Vinikoor's portion would be addressing separately a "Simplified 1041 version."

When Chair Meyer inquired from Dr. Perros about the status of the "Improve Communications to Taxpayers," subcommittee, this led to the following dialogue, which primarily addressed the OMB (Office of Management & Budget) Paperwork Reduction Act:

- Meyer alerted every one of the OMB requirements before the IRS can change a form.
- At one point, committee suggested that perhaps obtaining a subject matter expert would be helpful in order to learn the entire process.
- Recently there was an elevated recommendation made to the Joint Committee by the Area 5 Committee, (TAP 04-022) "Forms Testing" which requests that the number of IRS forms and instructions tested with focus groups be increased since there has been very little focus group testing of IRS individual income tax forms and instructions during the last seven years. (Committee confirmed that they had received copies of this recommendation.)
- Perros emphasized that the IRS needs to improve on simplifying their communications to taxpayers. As this committee addressed making changes to forms and/or publications, it's important to understand the process.

- Meyer explained “Notice of Proposed Ruling Making Regulations”, whereby the public is invited to provide comments.
- Bob Maziarz shared that in the Earned Income Tax Credit (EITC) Issue Committee which he also serves on, he along with Faith Vinikoor, have been dealing with modifying EITC forms, specifically Form 8862, Information to Claim EITC after Disallowance. Maziarz and Vinikoor have a first hand experience on the process involved with the pre-certification for those who are entitled to receive this tax credit.
- Tony DiMartino also shared that he has participated through the Reducing of Tax Burden-Notice Issue Committee on focus groups and he knows that the IRS is using focus groups whereby the public has been brought in to provide input. DiMartino stated that he has found this to be very productive.
- Mary Balmer shared that she is aware that the IRS is currently rewriting Form 990, Return of Organizations Exempt from Income Tax.
- **Action item for Inez: DFO Mapp requested that the committee allow time for the staff to obtain information on what outside focus groups are being used by the IRS to review revised forms and/or publications.**

Response to TAP 04-012-EFTPS Clarification of Tax Year

Chair Meyer inquired if every one had received the responses received back from the IRS based on the elevated recommendation and the response was yes they had.

Dick Bobb emphasized that the EFTPS has been programmed to generate the fiscal year-end and month from the master file in order to reduce these errors. Therefore, it is done!

The committee accepted the response with no additional comments. Inez shared that she will be sharing this information with TAP Program Analyst Barbara Toy.

Review of Committee’s Operating Procedures

Since this committee agreed by consensus to create the positions of Co Vice-Chairs, the committee reviewed the operating procedures to see if any changes needed to be made, but this is not warranted. The operating procedures will remain as is.

Area 2’s Re-Cap of Evaluation Survey & Guidance for Future TAP Committees

Chair Meyer turned this portion of the meeting over to Dick Bobb.

Dick Bobb stated that there are some very interesting themes throughout the input received. He inquired how many members had responded, and analyst said that 10 panel members participated. The names were not included as per Chair’s instructions.

Dick Bobb made the following summary:

- It seems that work gets done more on an Issue Committee level than on an Area Committee level.
- The Leadership role, not stepping on present leadership toes, requires a lot of time, and he feels that the Chair should set goals for the committee and make work assignments with follow-up dates.

Chair Meyer responded by reminding every one that back in January 2004, reflected in the meeting minutes of January 6, 2004, the committee discussed in length their “Goals and Objectives for Second Year Term”- and in conclusion agreed that it would focus this coming year on engaging in more extensive outreach to better educate the public on TAP and continue to work on grassroots issues.



Meyer went on to share that he speaks before different groups and always mentions TAP but so far it has been to no avail.

Meyer sees this as a volunteer organization and does not feel comfortable forcing volunteers to do what they are not comfortable with.

Perros pitched in and stated that next week he will be in Miami, Florida attending a business meeting and he too takes these opportunities to mention TAP whenever he is around a large group of people. Since he belongs to many organizations, he mentions TAP on a National level and strongly feels it is important to get the word out.

Meyer recalls that during the last TAP Annual Meeting, National Taxpayer Advocate Nina E. Olson shared that she envisioned TAP to be a "read and react" forum for the IRS. It seems that many members still do not understand the TAP mission. The tax code is a very incomprehensive thing to mankind.

Chair suggested that Dick Bobb take the lead on summarizing the responses received and he felt that this would be a great recommendation for this committee to elevate to the Joint Committee before its term is over. Chair requested that an hour be set aside just to discuss the "Evaluation Survey". Dick Bobb accepted this assignment. **Action item: Inez is to add this to next month's agenda. * (The Chair has requested after this call that this subject matter be moved to the September 2004 meeting agenda since the Chair will not be available for the Aug 2004 call)**

Publication 4255, IRS Tax Help Insert

Since Leonard Steinberg was not present on this call, this issue will be carried over to next month's meeting agenda. **Action item for Inez: to add this subject matter to the August 3, 2004 teleconference meeting agenda.**

Submitting Issues Directly to SAMS (Systemic Advocacy Management System)

Mary Balmer shared that she had found this system to be not user friendly. "Before the issue can be successfully submitted you are "pre-qualified" on an "Issue Qualification" page. You must answer all 5 questions correctly before you can go any further. It took many attempts before I figured out how to answer the questions so that I was allowed to proceed further. And it took this many attempts on my part (with prior knowledge of SAMS), I suspect the average taxpayer (with no prior knowledge of SAMS) may not ever get any further."

Mary forwarded her concerns to a SAMS contact individual who informed her that he would be sharing her concerns with the SAMS Advisory Board that was going to hold a meeting in June 2004. Inez shared that she has attempted to follow-up on this but had not received any feedback yet.

Outreach Efforts

Area 2 members Faith Vinikoor, Bob Maziarz, Tony DiMartino, and Leonard Steinberg attended the 2004 Nationwide Tax Forum in Atlantic City, New Jersey, July 6-8, 2004.

Vinikoor and Maziarz attended the Taxpayer Advocacy in Action sessions where TAP was acknowledged and Maziarz said a few words about TAP. Vinikoor observed a focus group of practitioners commenting on the regulation of unenrolled preparers and participated in a Notice focus group and EITC session. DiMartino attended a second focus group which also had to do with Notices.

Maziarz shared that he estimated that there were about 2,000 persons there. Many stopped by the TAP Booth to inquire about what was TAP all about. TAP received a lot of questions, but no issues. Some thought that TAP was there to evaluate sessions.



TAP Communication Strategy

Chair requested feedback, and since some members had indicated that they had not received it, Chair requested that the analyst send this out again to the committee since he needs to respond by the next Joint Committee meeting which is scheduled for July 20, 2004. **Action item: 1) Inez is to re-send the June 16, 2004 email to the entire committee, requesting that they review and forward their responses directly to the Chair by no later than July 19th**

2) Committee members are to review the "TAP Communication Strategy" and respond directly to the Chair as indicated above.

Response to Congress-Simplify Tax Code

Since Faith Vinikoor was not present on this call, this issue will be carried over to next month's meeting agenda. **Action item for Inez: to add this subject matter to the August 3, 2004 teleconference meeting agenda.**

Review of New Issues

Inez reported that no new issues have been received for the Area 2 committee during this past month.

News from the Staff

None

Public Participation/Input (2 Citizens from Maryland have registered)

Although 2 citizens registered to provide input to the Area 2 Committee, only one participated.

Ray Weinstein, shared that he works in a Law Firm, in the Washington, D.C. area, outside of Maryland. He handles a great deal of collection work; he represents taxpayers before the IRS to resolve tax issues in either establishing a payment agreement or with the submission of Offer in Compromises (OICs).

Mr. Weinstein shared that when a taxpayer receives a notice, and you call the 1-800 toll free number you usually do not get a quick response. You are usually told that you cannot be helped and your call is transferred; this is very frustrating and time consuming.

C. Morgan Edwards shared that the Notice Issue Committee, which he serves on also, is currently working in addressing the issue of the telephone number and contact person information provided on Notices. Mr. Edwards suggested that Inez forward this issue to the Notice Issue Committee.

DFO Mapp inquired from Mr. Weinstein what type of collection notice was it and whether a sanitized copy of the Notice with the specific CP number and telephone number be provided to the panel so that this matter be researched further. Mr. Weinstein promised to submit this information to Inez within the next couple of days. **Action item: Upon receipt of this information Inez is to share it with DFO Mapp and conduct appropriate research before referring this matter to the Notice Issue Committee.**

Mr. Weinstein also shared that sometimes when he gets to speak to an IRS Representative in ACS, Automated Collection System, he is asked for a valid Power of Attorney and for his CAF number, which is understandable, but then the taxpayer's date of birth is requested. DFO Mapp reminded everyone of the Disclosure Verification that is required.

Mr. Weinstein also stated that sometimes the Power of Attorney is not in the system under the Social Security Number.



Bob Maziarz shared that at the Tax Forum, it was discussed that the IRS is considering communication between the Practitioners and the IRS by email; the Practitioner will receive acknowledgment.

Face-to-Face?

Bob Maziarz inquired about the possibility of holding the face-to-face meeting within the next month. He believes this will be a good opportunity to discuss the "Evaluation Survey & Guidance for Future TAP Committees".

Analyst was asked what was the possibility of coordinating a face-to-face meeting for possibly August and she responded that currently, during this week, she was involved with TAP Interviews.

DFO Mapp stated that she had budget concerns. **Action item: DFO, and Analyst will be following up with the Nancy Ferree, TAP Program Manager concerning the DFO's concerns and Chair requested that he be kept informed of what transpires.**

Perros shared that he will be out of town within the next month and will not be able to participate on the August 3rd teleconference call.

Closing Assessment-Confirm next meeting: August 3, 2004 at 3:00 PM (ET)

Chair adjourned meeting after confirming the next meeting date and time.

These meeting minutes were reviewed and approved by consensus by the Area 2 Committee on August 3, 2004.



Area 2 Committee Meeting Minutes
Date: May 4, 2004 (3:00 PM – 4:30 PM EDT)
Via: Teleconference

Roll call was taken by TAP Program Analyst Inez E. De Jesus

Quorum= 9; quorum was met, 9 members and the Designated Federal Official (DFO) were present on this call.

Designated Federal Official (DFO)

- Terry L. Mapp

Panel Members Present

- Richard (Dick) Bobb, NC
- Anthony DiMartino, NJ
- Karen Kerrigan, VA
- Robert Maziarz, NJ
- Patrick McCombie, DE
- David L. Meyer, NJ, Chair
- Theodore Perros, D.C
- Leonard Steinberg, NJ
- Faith Vinikoor, MD

Members Not Present

- Mary Balmer, NC
- C. Morgan Edwards, NC
- Jerry Gensiejewski Jr., PA
- Calvin Johnson, VA
- Manning H. Mosley III, PA
- Robert Taylor, PA

TAP Staff

- Nancy L. Ferree, TAP Program Manager
- Inez E. De Jesus, TAP Program Analyst/Scribe

Welcome/Announcements

Chair David Meyer opened the meeting by welcoming everyone and sharing that he realized several weeks ago that he must prioritize his professional responsibilities due to the demands placed on him lately by his new job. At that time, he spoke to Vice-Chair Mary Balmer about Mary taking the lead of this committee and she communicated to him that she was having the same conflicts due to her job obligations and priorities. Meyer expressed regret that Mary was not on this call in order to share her own point of view.

Meyer went on to share that he will be stepping down as Chair and Mary as Vice-Chair; both intend to continue to participate as members but not in a leadership role. This leads to two positions that need to be filled, Chair and Vice-Chair for Area 2 TAP.



Address Area 2 Leadership/Election for Chair/Vice-Chair

When Meyer asked the committee who would be interested in fulfilling these two vacancies, there were no responses.

Meyer then asked Dick Bobb if he was interested in being Chair for the remainder of the term and Bobb said he could not due to other commitments. At this point, DiMartino and Vinikoor made some inquiries on what was needed in order to assist Meyer and the committee. By this point, Meyer said he would remain as Chair but he will not be able to participate on some of the upcoming face-to-face meetings, such as the upcoming Joint Committee later on this week due to job commitments. Chair expressed that he would need someone to fill the void when he was not available.

DiMartino and Vinikoor volunteered to fulfill the positions of Co-Vice Chairs for the remainder of the term and the committee agreed by consensus. This would be a new position.

TAP Program Manager shared that she and Inez had recently reviewed the committees' "Operating Procedures" and that she did not see any reason why the committee could not operate with two Co-Vice Chairs. **Action item: Committee will review their "Operating Procedures" during the next meeting to see if any changes need to be made. (Agenda item).**

Update on face-to-face meeting

- Chair Meyer proceeded to clarify some confusion there may be out there and share his perspective regarding the Area 2 face-to-face meeting. Meyer had been told that if the committee did not have an agenda to justify a face-to-face meeting, then a meeting should not be held.
- Meyer then stated that he sent out an email to the committee requesting "Proposed Agenda Topics". Not all committee members responded; he received about 5 responses, and two of these were in support of not holding the face-to-face meeting. A teleconference meeting was then held between, Ferree, DFO Mapp, Balmer, De Jesus, and David. After reviewing the agenda items submitted, since some of the issues were already being addressed by the IRS; thus, a decision was made not to have a face-to-face meeting. David expressed surprise at seeing that the decision was reversed.
- At this point, Program Manager Nancy Ferree shared that when David and Mary decided to step-down, she saw the issue of having a face-to-face meeting in a different light. She did not want to see the committee punished; she felt the meeting will cement the team.
- Meyer stated at this point that Dick Bobb's proposed suggestion to leave a "road map" of lessons learned for the newly reconstituted committee is one that has a lot of merit and would like the committee to consider for future discussion. Meyer wondered if these could be covered in future teleconference meetings.
- Dick Bobb asked whether the face-to-face would be well attended by the committee? He also emphasized that he feels it is very important for this committee to review what activities worked well and what didn't work well. During the next few months, this matter should be addressed. He advocates that the committee focuses on setting recommendations that would provide for more effective volunteer participation in the future and ensure more success for the Area 2 TAP. DiMartino concurred with Bobb.
- Since the committee agreed that this was a good idea and an agenda item for the face-to-face meeting, Dick Bobb volunteered to chair this portion of the meeting, since David Meyer will not be able to attend due to a business trip to California on that same week (which was scheduled and confirmed at the time it was agreed that there would not be a face-to-face meeting). Bobb believes that this topic should take about four hours for discussion and he envisions the committee breaking out in groups. Bobb has had a lot of experiences with volunteer work. He will focus on the successes, gripes, leadership skills and responsibilities. David advised that whatever is done is done within the context of the TAP Authority.

- Steinberg shared that he will be representing Area 2 at the upcoming Joint Committee meeting in Chicago, ILL., May 6-8, 2004. He informed the committee that he was not in favor at one point of holding the face-to-face meeting, but now feels there is a need to establish some groundwork without re-inventing the wheel. The committee should put their ideas down on paper/ for the record. Leonard requested from the committee that they let him know what issues they would like discussed at the Joint Committee face-to-face meeting. **Action item for the entire committee. Respond to Steinberg by Thursday morning, May 6, 2004. Also, Inez is to share with Steinberg the Chair's reports on "what committee has done and what are their goals".**
- DFO Mapp shared that "we did decide at one point not to have the face-to-face meeting", and she now agrees with Nancy that with the stepping-down of David and Mary, perhaps it will help to bring renewal to the whole process.
- Nancy Ferree stated that she appreciated the honest and candid input being expressed, and that although she does not have a vote on this committee, but as the Program Manager, she did not want to see the committee fall apart. She feels that this committee is very viable.
- Based on a question from DiMartino, Ferree responded that she had polled the members regarding the face-to-face meeting and 11 out of 15 members stated they would attend; 2 said no, and 2 did not return her call.
- Vinikoor shared that she noticed last year that the committee came together after they had their face-to-face meeting in D.C. A suggestion Vinikoor made is that in the future, the committee may consider under "lessons learned" that future face-to-face meeting(s) be held earlier in the year.
- **Summary:**
 1. Meyer will continue to be the Chairperson of this committee.
 2. DiMartino and Vinikoor, new position: Co-Vice Chairs for Area 2
 3. There will be a face-to-face meeting in D.C., June 11 and 12, 2004.
 4. The committees' "Operating Procedures" will be reviewed by the committee.
 5. Dick Bobb will chair part of the face-to-face meeting which will address the "Lesson Learned & Roadmap for future Area 2 TAP". **Action item: Bobb will be providing input for the draft agenda. Chair Meyer has some ideas he wants to bring forward and he will make sure these are included in the draft agenda.**

Motion to move July 6th teleconference to July 13, 2004

Steinberg reminded everyone that a Tax Forum will be held in Atlantic City, NJ on July 6th and that some of the panel members may be in attendance and he made a motion that the teleconference be changed to July 13th instead, at the usual time. Committee agreed by consensus. **Action item: Inez is to annotate the changes on TAP Master Calendar and inform all parties concerned of this change.**

Revised Power-of-Attorney Issue 2919

Chair Meyer shared with the committee his experiences with the recently revised Power-of-Attorney Form 2848. He had noticed that the revised form was requesting the paid preparer's social security number which should not be required to be disclosed. He immediately brought this to the attention of Nancy and Inez who researched this matter and followed-up immediately resulting in the IRS correcting the form and issuing on the website a new form without the request for the representative's social security number.

Meyer applauds Nancy and Inez for their immediate attention and follow-up to this matter. Meyer also expressed his gratitude towards a letter that Nancy had written to the Service- "job well done!"

Meyer also stated that he believes some of the erroneous forms might have been caught in between and that the rejections have been remedied.



Steinberg chimed in and stated that he read about some other group which caught this same matter also and that he too was impressed with how everyone at the IRS assisted in resolving the problem in a very short period of time.

Review/Approve Minutes from meeting on March 2, 2004

(Note: April 6, 2004 teleconference meeting was cancelled)

These minutes were approved by consensus.

Action Items from Prior Meeting

The only action item from the previous meeting minutes was for Nancy Ferree to arrange a teleconference meeting with a Subject-Matter-Expert for the sub-committee that is addressing the issue of Improving IRS Informational Bulletins. Records show that the teleconference with the Subject-Matter-Expert took place on March 9, 2004.

Status Reports from Sub-Committee Chairs

Form 1041 Issue #1309 (Mc Combie)

No Comment

Improvements to IRS Informational Bulletins Issue # 2389 (Perros)

Dr. Perros stated that he would have information to share at the upcoming face-to-face meeting.

Update on Elevated Issues (Telephones Issue # 70 and W-4 Issue # 494)

Chair Meyer reported that both of these issues have been elevated and accepted by the Joint Committee.

Steinberg shared that he is aware that the W-4 issue is going to Program Owner Margie Kinney from Small Business/Self-Employed (SBSE) and will be getting special attention.

Others chimed in and stated that the Area 4 committee and EITC (Earned Income Tax Credit) Issue committee have also done a lot of work regarding the W-4 issue.

Finalize Agenda Items for upcoming face-to-face meeting-

“Recap Committee’s Successes/Activities over the past 2 years and Lessons Learned”-**Action item: Dick Bobb will be providing input for this portion of the meeting agenda.**

Review of New Issues

Issue #2808, IRS Employee’s Email & Direct Number Be on Notices:

Analyst De Jesus reported that the following issue was received as a result of an outreach event Steinberg attended.

Background: Practitioner experienced a total of a 50-minute wait on an IRS toll free number when he responded back to a correspondence received from the IRS.

Issue Statement: 1) Practitioner suggests that the IRS Employee’s email address should be on the correspondence sent out to the practitioners. 2) Employee’s direct extension should be included besides the toll free number provided as a contact number. This will save a lot of time for the practitioner.



Discussion:

- Vinikoor stated that on the audit report you are led to believe that the person noted on the report can address your problem. This is misleading and not customer service. The National Taxpayer Advocate’s (NTA) 2003 Report to Congress addresses this matter. Vinikoor also shared that the EITC Issue Committee has brought up similar concerns to the Program Owner.
- DFO Mapp stated that due to the IRS’ infrastructure, the sharing of employee’s email addresses is not a good medium to use and should not be pursued.
- The committee agreed that this seemed like a legitimate complaint and that a response should be sent out to the Practitioner supporting the NTA’s position and that a copy of the report be sent out as well.

Action item: Vinikoor volunteered to prepare the response to the Practitioner.

Issue # 2917, Request Previous Years 1040 Information is Made Available On-line:

Background: Anonymous suggestion came in requesting to make it possible to access figures from previous years 1040 returns on-line.

Issue Statement: Previous years 1040 return information should be accessible to taxpayers on-line.

Discussion:

- Meyer addressed that there may be a security problem/disclosure issue.
- Vinikoor recalled a transcript that was once provided to taxpayers.
- There have been changes made to what is being issued at Taxpayer Assistance Centers.
- DFO Mapp suggested that Inez research what is currently being given out to Practitioners.

Action item for Inez: to obtain this information and have available for the committee at the next meeting.

Outreach Efforts

- Leonard Steinberg shared that he will be doing some TAP outreach next Monday, May 10, 2004, when he attends the “Institute of Management Consultants, New Jersey Chapter” meeting which will be discussing “Running a Small Business.”
- Dick Bobb shared that he did a local radio interview as discussed during the last meeting, and that he was invited to speak at local Kiwanis Club meetings for sometime in July and August of 2004.
- Faith Vinikoor inquired about Theodore Perros participation at the D.C. Tax Preparation & Information Fair back in February 2004, but he was not available to response.

Administrative News from the DFO

No news to report this month.

Public Input/Closing Assessment

None

Chair confirmed next meeting: face-to-face in D.C. June 11 & June 12, 2004

Chair adjourned meeting.

These meeting minutes were reviewed and approved by the Area 2 committee on July 13, 2004.



Area 2 Committee Meeting Minutes
March 2, 2004
3:00 PM- 4:30 PM EST

Roll call was taken by TAP Program Analyst Inez E. De Jesus

Quorum=9; quorum was met, 11 members and the Designated Federal Official (DFO) were present on this call.

Designated Federal Official (DFO)

- Terry L. Mapp

Panel Members Present

- Mary Balmer, Vice-Chair, NC
- Richard (Dick) Bobb, NC
- Anthony DiMartino, NJ
- C.Morgan Edwards, NC
- Jerry Gensiejewski, Jr., PA
- Robert Maziarz, NJ
- David L. Meyer, Chair, NJ
- Manning H. Mosley III, PA
- Robert Taylor, PA
- Leonard Steinberg, NJ
- Faith Vinikoor, MD

Members Not Present

- Calvin Johnson, VA
- Karen Kerrigan, VA
- Patrick McCombie, DE
- Theodore Perros, D.C.

TAP Staff

- Nancy L. Ferree, TAP Program Manager
- Inez E. De Jesus, TAP Program Analyst/Scribe

Welcome/Announcements

Chair David Meyer opened the meeting by welcoming everyone and by informing the committee of the following issues discussed during the last Joint Committee meeting he attended:

- Area 2's EFTPS-Clarification of Tax Year was approved and will be forwarded to the appropriate operating division.
- Area 2's Taxpayer's Feedback Option on Toll-Free Line was also approved and will be forwarded to the appropriate operating division.
- Area 2's W-4 Percentage recommendation has been returned to the committee for expansion. Meyer explained that questions arose during the Joint Committee meeting which resulted in him looking at the regulations again and thus re-drafting the proposal to incorporate that it will not take a regulation change under Section 7802 of the IRS Code. This led to questions

and answers among the panel members and followed by a motion to approve as amended. Chair will be returning the amended proposal back to the Joint Committee.

- **Issue regarding those members who have expressed a desire to remain for an additional year:** letters have gone out from the TAP National Office staff and Meyer has requested from the committee that if anyone has had a change of mind to please let him know, as soon as possible, either by email or by telephone so that he can relate this back to the TAP Director.
- **An additional face-to-face meeting issue:** TAP Director Bernie Coston shared with all the committee chairs that there was additional funding available for an additional face-to-face meeting. At first, the area committees were given first choice but by the end of discussion, it was decided that it would be allowed to those committees (area or issue) where there was a greater need. Chair explained that a decision had to be made right then and there and he expressed that there was no need for Area 2 to have a second face-to-face meeting.

Review/Approve Minutes from Meeting on February 3, 2004

These minutes were approved as amended; Faith Vinikoor noted that on page 3, bullet #2, Leonard Steinberg's comment was not annotated correctly. Steinberg agreed and noted that it should read as follows:

◆ Steinberg suggested that a 1041X Amended Form, showing both columns, should be developed similar to the 1040X Amended Return Form.

Analyst is to make this change and finalize the minutes as per consensus of the committee.

Action Items from Prior Meeting

Analyst confirmed that the following action items were addressed as noted:

- Dick Bobb expressed that he has not received any callbacks from his Local Taxpayer Advocate, and that he will renew his efforts to make a contact.
- Maziarz made the corrections to the W-4 draft proposal.
- Analyst De Jesus submitted copy of the Elevated Telephone Issue to Chair Meyer.
- A template with the committee's new subcommittees and volunteers for each was mailed out to all on February 25, 2004.
- TAP Program Manager Nancy Ferree shared that the sub-committee that is interested in beginning a dialogue with the IRS on the processing and background behind informational bulletins met on March 1, 2004. As a result of this meeting, Nancy is in the process of coordinating a meeting with the sub-committee and a Subject-Matter-Expert (SME). Tentatively she is aiming for the dates the sub-committee has requested, either March 9th or March 10th at 3:00 PM ET. Nancy requested that any questions the sub-committee may have may be sent to her after this call. **Action item for Program Manager Ferree.**
- Issue #2590, Processing of Notices of Deficiencies, closing letter was composed by Chair and issue was closed on February 23, 2004.
- Issue #2115, Suggestion to Improve 1040 NR Instructions, closing letter was composed by Chair and issue was closed on February 9, 2004.

Status Reports from Sub-committee Chairs

Sub-committee chairs were not available on this call in reference to the 1041 and Informational Bulletins issues.

Vinikoor shared that since she will not be available on the next teleconference, she has shared the questions she has regarding electronic 1041's with DiMartino for the Subject Matter Expert (SME) on the Form 1041, United States Income Tax Return for Estates and Trusts.



Vinikoor wants to know what barriers does the SME see regarding 1041 e-filing and Steinberg addressed her other question, and confirmed that the current package available is for professionals only.

Vinikoor also shared that she has prepared and shared with the sub-committee a draft Simplified 1041 proposal.

Analyst shared that she has recently spoken to the SME and he plans on participating with the entire committee on the next call.

Formation of New Sub-committees- 2004

1. Reduce Processing Time of Offer-in-Compromise (OICs)
2. Review OIC's criteria's
3. Research Efiling Alternatives
4. Interactive Forms-Review Proposal to Provide Free Tax Preparation Software
5. Plain Language Publications

Chair Meyer thanked those who had volunteered to participate on these new sub-committees. He shared that he is in the process of coordinating some information, specifically concerning OIC's and will be sharing this information soon with all concerned.

Mosley III requested that his name be added to the Review OIC's criterias.

Bobb suggested that #3 and #4 be combined.

Review of New Issues

Analyst confirmed that there were no new issues received this past month.

Outreach Efforts

Chair shared that Theodore Perros had participated during the month of February 2004 on an outreach event but unfortunately he was not available to discuss his experiences with the committee at this time.

Steinberg shared his idea of perhaps creating a way of informing the public in the Mid-Atlantic States of the Alternate Minimum Tax (AMT). He feels that it is very important to let people know since many will be affected by this. This led to a discussion among the members resulting in agreement that this issue has a high visibility these days and it is getting lots of coverage already.

Vinikoor reminded everyone of the website Balmer had shared earlier with the committee that had a lot of information regarding AMT. (<http://www.reformamt.org>)

Maziarz shared that he recently saw on television, Nina E. Olson, the National Taxpayer Advocate, addressing the AMT, and she was doing so as a private citizen.

Chair Meyer reminded everyone that if they feel strongly about the AMT, to contact their local Senators and House of Representatives, but as a panel, we couldn't address this legislative issue. Bobb expressed that he is currently doing this. Chair also mentioned that this is the only way to get their attention up on the Hill.

Mention was made that many congressional websites have ready-made letters and also the opportunity to make a donation if you wish.



Dick Bobb shared that this coming Thursday, March 4, 2004, he is scheduled for a radio interview where he will have the opportunity to spread the word about TAP's existence and mission. The committee expressed their enthusiasm about this opportunity.

Administrative News from the DFO

DFO Mapp deferred this portion of the meeting to Analyst De Jesus. Analyst shared that she is getting ready to make plans for the committee's face-to-face meeting in Washington, D.C., on June 11 & June 12, 2004 , and would like to hear from anyone who did not think they would be able to attend.

Program Manager Nancy Ferree explained that in order to obtain the hotel's conference room for the meeting on a complimentary basis, a commitment of a certain number of lodging rooms is expected by the hotel.

TAP Program Manager Ferree thanked everyone for their recent kind expression of sympathy.

Public Input/Closing Assessment

No public input.

Chair Confirmed Next Meeting: April 6, 2004, 3:00 PM ET

Chair adjourned meeting.



**Area 2 Committee Meeting Minutes
February 3, 2004
3:00 PM - 4:30 PM EST
Teleconference**

Roll call was taken by TAP Program Analyst Inez E. De Jesus

Quorum= 9; quorum was met, 11 members and the Designated Federal Official (DFO) were present on this call.

Panel Members Present

- Mary Balmer, Vice-Chair, NC
- Richard (Dick) Bobb, NC
- Anthony DiMartino, NJ
- C. Morgan Edwards, NC
- Robert Maziarz, NJ
- Patrick McCombie, DE
- David L. Meyer, Chair, NJ
- Terry L. Mapp, DFO
- Theodore Perros, D.C.
- Robert Taylor, PA
- Leonard Steinberg, NJ
- Faith Vinikoor, MD

TAP Staff

- Steve Berkey, National Office Program Analyst
- Inez E. De Jesus (Scribe)

Members Not Present

- Jerry Gensiejewski, Jr., PA
- Calvin Johnson, VA
- Karen Kerrigan, VA
- Manning H. Mosley III, PA

Welcome/Announcements & Welcome to New DFO Mapp

Chair Meyer opened the meeting by welcoming everyone.

The committee expressed its condolences to the Ferree family due to their recent loss.

Panel Member Perros shared an article that appeared in the February 3, 2004, Washington Times newspaper, which discusses the Alternate Minimum Tax (AMT) legislative issue that is also addressed in the National Taxpayer Advocate's 2003 Annual Report to Congress, as the most serious problem encountered by taxpayers. Perros promised to forward this article to all. Chair Meyer tabled this topic for discussion towards the end of the meeting.

Review/Approve Minutes from Meeting on January 6, 2004

Minutes were approved by consensus.



Action Items from Prior Meeting

Analyst confirmed that the following action items were addressed as noted:

- A letter of appreciation to former DFO was mailed on January 15, 2004.
- TAP Master Calendar was updated on January 7, 2004.
- Continue to contact the Form 1041 Subject Matter Expert, and inform him of change of face-to-face meeting location and other date change as discussed during last month's meeting. - Done on January 7, 2004.
- Analyst also shared that she had arranged a teleconference meeting for the 1041 subcommittee, which was held on January 22, 2004. (The subcommittee will update the committee later on during this call)
- List of LITC's (Low Income Tax Clinics), Publication 4134, was distributed to the entire committee on January 9, 2004.
- Issue # 1727, CP-2000 Notices, was forwarded to the Reducing Taxpayer Burden- Notices Issue Committee on January 7, 2004. DiMartino shared that the issue had been accepted by the committee and will be addressed.
- EFTPS Recommendation was incorporated into the Chair's last monthly report to the Joint Committee. (Will be discussed during the Joint Committee's February 17, 2004 teleconference meeting)
- The W-4 Issue will be addressed during this meeting.

Action items that are still pending

Bobb & Edwards will get together to address the issue of getting the citizens/taxpayers from N.C., and S.C. knowledgeable of TAP's existence and mission.

Status Reports from Sub-Committee Chairs

Form 1041 Issue (Simplification of Instructions)

Patrick McCombie shared that the subcommittee met via teleconference on January 22, 2004, and the following is an update of their discussion:

- McCombie will be completing soon the document with the changes to the instructions to the Form 1041, U.S. Income Tax Return for Estates and Trusts.
- Vinikoor is currently addressing the creation of a Form 1041EZ, although it will not be called EZ.
- Vinikoor shared that the IRS representatives have stated that it is doable to make changes to IRS forms and publications.
- DiMartino stated that in order to simplify Form 1041, the suggestion should not be too complex.
- Steinberg suggested that a 1041X Amended Form, showing both columns, should be developed similar to the 1040X Amended Return Form.
- Vinikoor also shared that she recently learned there is an electronic 1041.

W-4 Draft Recommendation

Bob Maziarz shared that he had received suggestions from the committee that wherever the word salary appears that it be replaced with the word paycheck. The committee agreed that once Bob makes these minor changes, he will share the document with all, and it should be ready to be elevated to the Joint Committee at this point. **Action item: Maziarz will make corrections/ De Jesus- will ensure that this recommendation is elevated to the Joint Committee.**

Re-visit Elevated Telephone Issue

Chair Meyer made a motion to amend this proposal. Discussion held concluded that:



- Give the taxpayer the option of providing feedback on the service received, and leave it to the IRS to create the questions.
- Revise the proposal, make it a simple questionnaire. Example: Was your call answered in a timely manner?

Action item: De Jesus will send copy of the recommendation to the Committee Chair.

Formation of New Sub-committees- 2004

Chair Meyer opened this segment of the meeting by referencing email he sent out on January 7, 2004, whereby he confirmed that the Area 2 Committee had decided to engage in more extensive outreach this year to better educate the public on TAP, and also the creation of the following new subcommittees:

1. Reduce Processing Time of Offer-in-Compromise (OICs)
2. Review OIC's criterias
3. Research Efiling Alternates
4. Interactive Forms- Review proposal to provide free tax preparation software
5. Plain Language Publications*

Meyer stated that he had received some responses indicating interest and would appreciate those who had not responded yet to do so as soon as possible. **Action item: Meyer/De Jesus- once all members respond, a template with the members of the new subcommittees will be shared with all.**

* Perros shared that he had requested from the Analyst to obtain a Subject Matter Expert (SME) in order to begin the dialogue with the IRS on the processing and background behind informational bulletins. **Action item: Inez is in the process of obtaining a SME for this subcommittee.**

Review of New Issue(s)

Analyst referenced Issue #2590, from a Practitioner in New Jersey.

Chair Meyer shared with the committee that he spoke to the Practitioner and learned that the client had received a 30 day letter from the IRS and the Practitioner responded in 29 days but received a notice of deficiency dated 3 days later. Apparently the response was not inputted timely due to a computer program.

Vinikoor referenced that the combination letter problem which relates to this issue is also addressed in the 2003 Report to Congress as one of the most serious problems encountered by taxpayers.

DiMartino referenced the Single Point of Contact Notice Issue Committee Representative Jim Cesarano who has often mentioned that the IRS is aware of these issues, and it's going to take a long time to resolve.

Balmer stated that certain generated notices do not speak to one another. This led to a discussion among the members on how in the new IRS Budget there is no monies earmarked for the modernization program of IRS computers. All agreed that it would take a long time to get the IRS computers to communicate with one another. The committee agreed that the IRS is cognizant of this problem and there is nothing the committee can do regarding this issue. **Action item: Chair will compose closing letter and Issue #2590 will be closed by the analyst.**

Review of Parking Lot Issue- Beyond TAP's Scope- ♦Suggestion to Improve 1040 NR Instructions (Issue # 2115)

Vinikoor suggested that this citizen be referred to the Systemic Advocacy (SAMS) system since his



suggestion goes beyond the scope of the TAP's mission since it is really a legal issue involving non-resident aliens.

Committee agreed that this issue be closed. **Action item: Chair will compose closing letter and Analyst will ensure that this issue is closed on the TAP database and all actions recorded.**

Administrative News from the DFO

Recently assigned DFO, Terry L. Mapp, Local Taxpayer Advocate, Philadelphia, introduced herself to the committee and stated that she looked forward to be working with this panel. At this time, there was no administrative news to report.

Analyst De Jesus shared that she had placed an order for hardcopies of the National Taxpayer Advocate's 2003 Annual Report to Congress and she needed to know how many members were interested in obtaining the hardcopy version or the CD version. Members Bobb, DiMartino, Maziarz, Perros, Steinberg, and Taylor responded that they prefer a hard copy. (Members Balmer and Vinikoor had already placed an order) Chair Meyer reminded everyone that the report can be obtain by accessing the www.irs.gov website.

Public Input/Closing Assessment

Analyst shared that although a citizen from Virginia had registered to participate on this call, he did not sign on. There was no public input.

Before meeting ended, the Alternate Minimum Tax (AMT) legislative issue was discussed among the members since some members strongly feel that since this will be a major force during the next year or two, that perhaps this committee should address it as well. The following was discussed:

- A subcommittee be created to show support to the National Taxpayer Advocate's initiative regarding this issue. Perhaps the creation of an education program whereby a fact sheet notifying taxpayers of AMT, its purpose, etc be used as a distribution item and at the same time remind taxpayers that they should contact their representatives in Congress.
- Incorporate AMT during their outreach efforts.
- Write a letter of support to Nina Olson.

DFO Mapp shared that the previous week she had delivered the National Taxpayer Advocate's 2003 Report to 10 Congressmen within her district in Philadelphia and she can confirm that Congress is very much aware of the AMT issue and how it is the most serious problem that will affect a significant and increasing number of taxpayers. She suggested that the best way is for taxpayers to contact their congressional representatives.

Balmer referenced the Brookings Institute website where the Alternate Minimum Tax is also being discussed: <http://www.brookings.edu/views/op-ed/gale/20040121amt.htm>

Some members expressed that this should be an initiative outside of TAP, as a public service.

Action item: The following members Meyer, Perros, and Steinberg agreed to draft a document regarding AMT and then decide later on how this information will be distributed/shared.

Confirm Next Teleconference Meeting: March 2, 2004, at 3:00 PM ET

Chair adjourned meeting.



Area 2 Committee Meeting Minutes

January 6, 2004
3:00 PM - 4:30 PM EST
Teleconference

Roll call was taken by TAP Program Analyst Inez E. De Jesus.

Quorum is 9, 11 members participated and the Acting Designated Federal Official (DFO).

Panel Members Present

- Mary Balmer, Vice-Chair, NC
- Richard (Dick) Bobb, NC
- Anthony DiMartino, NJ
- Nancy L. Ferree, Acting DFO
- Karen Kerrigan, VA
- Robert Maziarz, NJ
- Patrick McCombie, DE
- David Meyer, Chair, NJ
- Manning H. Mosley III, PA
- Theodore Perros, D.C.
- Leonard Steinberg, NJ
- Faith Vinikoor, MD

Members Not Present

- C. Morgan Edwards, NC
- Jerry Gensiejewski Jr., PA
- Calvin Johnson, VA
- Robert Taylor, PA

TAP Staff

- Inez E. De Jesus (Scribe)

Welcome/Announcements

Vice-Chair Mary Balmer opened the meeting by welcoming everyone.

Since DFO Lou Romito retired on January 2, 2004, TAP Program Manager Nancy Ferree will be the acting DFO for Area 2 until further notice.

Panel Member Perros suggested that a letter of appreciation be sent out to the former DFO acknowledging the committee's gratitude for his support. Committee was in agreement. **Action item: Meyer will draft the letter.**

Chair Meyer shared his concerns regarding the current budget restrictions the Treasury/IRS is experiencing due to the growing deficit, and expressed that we should be more sensitive to cost constraints when planning our face-to-face meetings. After committee discussed the pros and cons, it resulted in that the **location of the June 11 and 12, 2004, face-to-face meeting will be held in Washington, D.C., and not S.C.** as previously discussed. Also, it was confirmed that the March 2004



teleconference meeting will be held on Tuesday, March 2, 2004 from 3:00 pm to 4:30 pm ET instead of March 5th as previously noted. **Action item: TAP Program Analyst De Jesus will ensure that all the TAP calendars are updated accordingly annotating these 2 changes.**

Committee discussed District Counsel's response to the **W-4 issue** to the **question:**

If by allowing the taxpayer to enter a percentage rather than a dollar value, would this require a change in the regulations or would it simply be a change in the interpretation of Code Section 3402. **Response:** it would require a change in the regulations.

Committee decided to pursue this issue and elevate it to the Joint Committee and the sub-committee will begin to write up the proposal to recommend that a change be made to line 6 on the Form W-4, whereby the option to use a percentage rather than a dollar amount be available. **Action item: Maziarz will draft the recommendation and Perros will review/edit it.**

Review/approve minutes from meeting on December 2, 2003

These minutes were reviewed and approved by consensus.

Action items from Prior Meeting(s)

Program Analyst Inez E. De Jesus reported the following:

- Issue # 37- Treatment by IRS Employee was closed on 12/04/2003.
- Issue # 599- Taxpayer Had Problems Determining Balance Due to IRS (Direct Debit Installment Agreement DDIA) was closed on 12/11/2003.
- Issue # 1490-Improved Telephone Service by Private Consultant was closed on 12/05/2003.
- Issue # 1531- Paragraph about TAP in IRS Publications issue has been placed in parking lot status.
- Issue # 2074-Practitioner Assistance at S.C. Taxpayer Assistance Center was closed on 12/11/2003.
- Issue #2126- Improve Menu Choices on Toll-Free Number Given on Notices was closed on 12/05/2003.
- Analyst mailed, as requested, to Chair Meyer, copies of the 2 letters received from the citizen from S.C regarding Issue # 2115, Suggestion to Improve Form 1040 NR Instructions (U.S. Non-Resident Alien Income Tax Return)

Action items that are still pending:

1. **Bobb & Edwards: will get together to address the issue of getting the citizens/taxpayers from N.C. and S.C. knowledgeable of TAP's existence and mission.**
2. **De Jesus: to continue to make contact with Subject Matter Expert on Form 1041 and inform him of change of face-to-face meeting location and other date change.** Analyst reminded everyone that this individual will not be available until after February 2004.

Review Goals/Objectives for Second Year Term

Chair Meyer suggested the committee address what is important. This resulted in the following discussions:

- Make IRS Forms/Informational Bulletins user-friendlier- Perros suggested that perhaps the staff might be able to arrange a meeting with someone who prepares informational bulletins for the IRS. (Cross-reference Issue #2389)
- Balmer suggested that it is important to focus more on outreach and getting the word out that TAP exists and what its function is.



- Acting DFO Ferree suggested that during the upcoming Recruitment period for new panel members would be an excellent opportunity for the members to assist with the marketing of the TAP program.
- Reaching out to local homeowner's associations and civic groups are also great avenues for getting the word out.
- Making contact with the local Taxpayer Advocate Service and the local Low Income Tax Clinics (LITCs) in order to be kept abreast of upcoming events that the panel can partner with are other avenues. **Action item: Analyst De Jesus is to share with the panel the latest list of LITC's locations (Publication 4134).**
- Being informed of IRS activities like the Tax Forums is another avenue for doing outreach efforts.
- This is an excellent time to begin outreach since it's the beginning of the tax season.
- Liaison with community newspapers. Since folks don't know that TAP exists, therefore, we are not getting issues to address.

In conclusion, the committee agreed that it would focus this coming year on engaging in more extensive outreach to better educate the public on TAP and continue to work on grassroots issues.

Status Reports from Sub-committee Chairs

Simplification of Form 1041 Issue- Sub-Chair McCombie will be setting up a sub-committee meeting soon in order to move forward with the recommendation to simplify the 1041 form or instructions.

Action item for McCombie

McCombie stated that he has been waiting to hear from the Subject Matter Expert (SME) and analyst reminded everyone that SME will not be available until after February 2004 since he is currently tied up with the issuance and updating of IRS forms and publications.

Vinikoor mentioned that she had a few questions regarding the line-by-line breakdown of the report received from the IRS Economist on the 2002 1041 RTF.

Di Martino thanked Steinberg for the information that he shared with the committee on this same subject matter. Steinberg mentioned that he receives this type of data from ♦Quick Tax Finders Publishers.

Vinikoor also mentioned that working on this issue ties in closely with Chair Meyer's objective for the committee to address how to make forms simpler.

CP-2000 Notices Issue

DiMartino shared with the committee that he had discussed this issue during his most recent meeting with the Notice Issue Committee and they agreed that this issue should be addressed by them. (Program Analyst Jim Cesarano will assist also with this issue). The Subject Matter Expert that the TAP Staff had tried to obtain will not be needed at this point. Committee agreed. **Action item: De Jesus is to forward this issue to the Notice Issue Committee.**

EFTPS Recommendation

After reviewing the draft recommendation prepared by Dick Bobb, the committee agreed by consensus that this issue is ready to be elevated to the Joint Committee. The essence of this recommendation is that the Electronic Filing Telephone Prompts System (EFTPS) does not differentiate between Calendar year-end and Fiscal year-end taxpayers. **Action item: De Jesus will formalize this issue and ensure that it is incorporated into the Chair's monthly report to the Joint Committee.**

Revisit Elevated Telephone Issue- **Action item: Chair Meyer will address this during the next teleconference meeting.**



Brainstorm Outreach Efforts

- Balmer mentioned that she and Perros are scheduled to attend on January 17, 2004, the Tri-State Enrolled Agents Seminar in Virginia, where they will be doing TAP outreach in conjunction with the Local Taxpayer Advocate.
- Balmer attended during the past month at Virginia Tech an outreach event where she had the opportunity to spread the word of TAP's existence.
- Vinikoor mentioned that she attended a Practitioner Seminar in Maryland, which turned out to be very successful despite the adverse weather condition. She was able to distribute TAP marketing materials at this event.
- Both Balmer and Vinikoor agreed that there still seems to be some confusion out there on the different functions of TAP vs. TAS (Taxpayer Advocate Service).
- DiMartino inquired on how do we find out about these events and the response received was: Contact your local advocate.
- Perros shared that at many of the meetings he attends; he makes sure to speak about TAP. He inquired what type of questions the others got when they interacted with the public, and the response received was that the public wanted to know what the accomplishments of the TAP are so far.
- It was discussed that during outreach events there is not too much feedback received from the public.
- Mosley III mentioned VITA Program (Volunteer Income Tax Assistance) as another outreach opportunity for all. The VITA sites are available on the IRS website.
- Bobb shared that last year he had been approached by a local radio station in N.C., and since it's the beginning of the tax season they recently contacted him again and he is scheduled to participate during the end of February 2004 tentatively.
- All agreed that it is a good idea to stay in contact with their local advocates, LITC's, and Media Specialists

Review of New Issues

None

Low Income Tax Clinic's Conference Report

Vinikoor shared she had attended the recent LITC National Conference in D.C., during early December 2003, and learned that the LITC Director Randy Swartz encourages the TAP to partner with their local LITC's.

Administrative News

None

Public Input/Closing Assessment

No public participation during this call. Chair adjourned the meeting and thanked everyone for their input and participation.

Confirm next meeting: February 3, 2004 at 3:00 PM ET.

*These minutes were approved by consensus by the Area 2 Committee on February 3, 2004.(ied)