



2007 Meeting Minutes Area 2

- November 21, 2007
 - October 17, 2007
 - September 19, 2007
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 - June 20, 2007
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 - April 25, 2007
 - March 21, 2007
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 - January 17, 2007
-

Taxpayer Advocacy Panel (TAP) Area 2 Committee Meeting Minutes

Committee's Teleconference Meeting November 21, 2007 @ 2:30 PM ET

Designated Federal Official (DFO)

Lois G. Lombardo, Local Taxpayer Advocate, Philadelphia, PA

Members Present

Bill Bly, Wayne, PA
Paul Brubaker, York, PA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Emilio Cecchi, North Bethesda, MD
Benson Chapman, Wayne, NJ
Steve Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Carolyn Hutchinson, Fletcher, NC
Sonny Kasturi, West Orange, NJ
Paul McElroy, Bethania, NC
Lyn Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC

Members Absent

Michael Bryant, Oakton, VA
Blanche Davis, Rehoboth Beach, DE
William Yaeger, Alexandria, VA



Staff Present

Nancy L. Ferree, Plantation, FL, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst
Anita Fields, Note Taker
Bernie Coston, TAP Program Director

Guest(s) Present

Connie Sharpe, Reva, MD
Terrance Adlhock, Washington, DC
Joel Lawson, Villanova, PA
Ray Boyle, Wilmington, Delaware
Louise McAulay, South Carolina
Edward Johnson, Florence, NJ
James Brock, Williamsburg, VA
Joseph, Holley, Barboursville, WV
Robert McQuiston, Bryn Mawr, PA
Peter Welch, Charlotte, NC
Vladimir Turkeltaub NJ
Robert Patterson, York, PA

Welcome & Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone.
Roll call was taken and quorum of 8 was met.

Welcome to New Members

Lyn welcomed all the new members. He informed them that he is working on getting mentors for the 7 names he was given. Lyn will be their ad hoc mentor until a permanent one is assigned.

Comments from TAP Program Director

Bernie Coston thanked the retiring panel members for the leadership, commitment and time that they have shown during their tenure. He also took time to ensure the guests on the call that are waiting their appointment that we will be getting an answer back from Treasury really soon, and to keep the week of December 10th open. Bernie reported that the 2007 Annual Report would be released early. He reported that for the first time in TAP history we are going into the New Year with a clean slate as far as elevated issues are concerned. He announced that the issue committees are available for selection, for the returning members to choose. He informed them to make a selection and send the response to Sandy McQuin. The results of the election for TAP Chair and Vice Chair will be out by the end of the week.

Joint Committee (JC) Report

Lyn Sinnamon informed the committee of the mentoring program. He also made it known that Nancy Ferree is managing Area 1 in addition to Area 2 & 3. This is just until a new manager is named.

Highlights of Upcoming Annual Meeting in DC

Lyn made reference to the draft agenda and schedule, he also informed the committee of the Area 2 dinner on Tuesday night at Clydes.

Reminders: Self Assessment and Annual Report

There is a real push to get the Annual Report out by March 2008. Lyn stated that he would like for Area 2 members get their Annual Self Assessment to him expeditiously.



Status of TAP 206-004- Timely Response Required on Envelopes

Bill Bly reported that we did get a response. The suggestion was that the IRS put timely response required on the outside of envelopes where there might be a 60 day window or less time for the taxpayer to respond. The IRS replied that it can't be done because it is cost prohibited and it has to be done by hand. Bill Bly proposed that they accept the response, but also draft a memo requesting that the next time they deal with the program that handles their mail-outs to consider this an enhancement to be handled in the future. The committee decided to close proposal rejected by consensus and Bill Bly has volunteered to draft a memo.

Review/Confirm Meeting Minutes- October 17, 2007

The minutes were approved by consensus.

Placeholder for Screening Committee's New Issues (Steve Fulkrod)

Steve Fulkrod reported there is nothing to report this month.

Subcommittee Reports On Active Issues:

Review of Issue 3910- Delay in TAC Services and Support

Blanche Davis is the lead on this issue and is not available to give a report. There was a consensus to carry over to next month.

Issue 3948, Form 944, Change Threshold (Sonny Kasturi)

Subcommittee did research and agreed there is no way the committee can tackle the threshold issue because the IRS just started looking at the thresholds. The committee agreed to place in parking lot and re-visit at a later date.

Issue 3997; Terminate "S" Election- (Robert Haines)

Bob Haines stated that the IRS has issued a new Form 1120S with a box on it, which is what, was going to be suggested. It is suggested that it gets placed back in the parking lot, because by them adding the box they are going to have to change the regulation which we were also concerned about with the instructions.

Issue 4155, Schedule D Carryover Losses (Benson Chapman)

Ben Chapman stated that this is still an active issue. The IRS is not going to change the Schedule D. The suggestion is that the IRS computers be programmed to track the carryovers automatically from one year to the next. We will discuss further at the December meeting.

Nancy Ferree stated that she will share information from the program owner at the December meeting.

Issue 4182, Standardization of 1099 Forms- (Robert Haines)

Paul Brubaker stated that based on the cooperation from IRS National Office Susan Berry, he suggested that this be placed in the parking lot because nothing is being done with it. Information was sent and there was an agreement that something needed to be done this year we are going to try and collect more examples and feed them back to the committee. The committee agreed to place in parking lot monitored by consensus.

How will Area 2 Accomplishments get into the TAP Annual Report (Lyn Sinnamon)

Lyn Sinnamon is looking to have self-assessments to him by the end of November for non-returning members and December for the members that are going to Washington. This is an intricate part of getting the Annual Report out.



Outreach Events

Kimberly Brown reported that there was 20 outreaches in October and not yet finished with November. Nancy Ferree took the time to thank Kim for taking such good care of reporting each month on the outreach.

Public Input

The participants had questions reference to the information for the Annual meeting and the information was given to them.

Farewell to Lyn, Bill, Brubaker, McElroy, Sonny and Elizabeth

Nancy Ferree took this time to thank all of the retiring members for their dedication and time that they volunteered to work on the panel. Inez informed the panel of the responses back from the IRS on Issue 4011 Form 8863 Education Credits has been adopted in part. Also, Issue 3944 Tax Treatment of Litigation Settlement Proceeds was adopted in part. Again, Inez gave Kudos to both Sonny and Elizabeth for the roles they played in these two issues.

Closing Assessment/Q&A/Meeting Survey

Chair Lyn Sinnamon in closing informed all returning member of the meet and greet on Monday at 5pm December 10th. He encouraged the returning members to try and arrive by 5pm to meet and greet the new members of area 2.

Next Face to Face Meeting in Washington D.C.: Official meeting begins on December 11, 2007 at 8:00 AM ET. Area 2 will meet December 12, 2007 at 8:00 AM ET.

Certification: These minutes were approved by the TAP Area 2 committee, by consensus, on 12 December 2007.



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Meeting Minutes**

**Committee's Teleconference Meeting
October 17, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Lois G. Lombardo, Local Taxpayer Advocate, Philadelphia, PA

Members Present

Bill Bly, Wayne, PA
Paul Brubaker, York, PA
Michael Bryant, Oakton, VA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Emilio Cecchi, North Bethesda, MD
Benson Chapman, Wayne, NJ
Steve Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Sonny Kasturi, West Orange, NJ
Paul McElroy, Bethania, NC
Lyn Sinnamon, Arlington, VA, Chair

Members Absent

Blanche Davis, Rehoboth Beach, DE
Carolyn Hutchinson, Fletcher, NC
Elizabeth Warnecki, Ladson, SC
William Yaeger, Alexandria, VA

Staff Present

Nancy L. Ferree, Plantation, FL, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst
Anita Fields, Note Taker

Guest(s) Present

Connie Sharpe, Reva, MD
Terrance Adlhock, Washington, DC
Joel Lawson, Villanova, PA
Norman Klug, Easton, MD
Robert Grzebinski, Raleigh, NC
Edward Johnson, Florence, NJ
Ava Anders, Liberty, WV
Joseph, Holley, Barboursville, WV
Robert McQuiston, Bryn Mawr, PA
Peter Welch, Charlotte, NC

Welcome & Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone.
Roll call was taken and quorum of 8 was met.

Joint Committee (JC) Report

TAP Managers attend a TAS leadership training.



Thanks to Elizabeth and her team Issue 4011 was elevated and thanks to Sonny and his team Issue 3944 was elevated. There will be an exiting member survey and Bernie Coston, TAP Director would like all graduating member to please answer survey. Chair election process was discussed. We talked about mentoring program. There were no issues from Area 2 that had not been resolved. Lyn requested that the area 2 members review the chair's monthly reports and meeting minutes since these are the vehicles that are used for the TAP Annual Report. He requested that if they saw any discrepancies to please let it be known.

New Election Process for TAP Chair & Vice Chair

Lyn Sinnamon asked if there were any question on the new election process. Benson Chapman was nominated for TAP Chair and he did accept.

Elizabeth Warnecki has been selected to represent Area 2 on the nominating committee.

TAP annual Metting December 10-14 2007

Lyn Sinnamon stated to the committee to please fill out the travel request form that had already been sent out. Also indicate when you would like to fly and please follow travel regulations.

Review/Confirm Meeting Minutes- September 19, 2007

Robert Haines moved that the minutes be approved and Kimberly Brown seconded. The minutes were approved by consensus.

Screening Committee's Recommendation on Issue 4333- National Standards for Allowable Living Expenses-(Steve Fulkrod)

Steve Fulkrod stated that the problem was that revenue officers would not go off the tables, but the bureau stated that they are allowed to. Steve and the screening committee suggest that it be dropped. The IRS as of September just updated this table on a regional basis. The committee agreed to drop this issue by consensus.

Subcommittee Reports On Active Issues:

Issue 3948, Form 944, Change Threshold (Sonny Kasturi)

Sonny Kasturi reported that he will continue research on this issue.

Issue 3997, Terminate "S" Election- (Robert Haines)

He will have a report out in a few days.

Issue 4155, Schedule D Carryover Losses (Benson Chapman)

Ben Chapman stated that the subcommittee is not ready to drop this issue even though the IRS has indicated that this issue should not be addressed any further since there is no plan to add back the lines on the Schedule D.

Program Manager Nancy Ferree volunteered to set up a call to go review the research report with the subcommittee.

Issue 4182, Standardization of 1099 Forms- (Robert Haines)

There is still research with this issue. The SME wanted to see more specific examples of the problem. Paul Brubaker sent examples to Inez and she forwarded them on to the IRS on 10/15/2007.

Bob Haines reported that the IRS was sympathetic to this issue and they to believe there is a problem. Paul Brubaker shared that the VITA committee is also interested and are addressing this issue as well.



Possible New Issue on Form 1041 Instructions- (US income Tax Return for Estates and Trusts)- (Robert Haines)

Robert Haines had no information to report because he has not had time to review to determine if there is a new issue. Nancy Ferree promised to send him historical information on this issue.

Motion to Drop Parking Lot Issue 3868- Object Sale of Private Info to Third Parties—(Sonny Kasturi)

Sonny stated that there was a position paper sent last year to the IRS Commissioner; therefore we decided to monitor it. Sonny proposed to drop the issue since there are other organizations working on this issue to date. The committee decided to drop by consensus.

Issue 4273- Returned from Ad Hoc, TAP Info in Form 1040 Instructions- to Parking Lot Status (Lynwood Sinnamon)

Issue 4273 is an issue of communication. Lyn is still trying to find someone to take this forward. Issue is in the Parking Lot. Lyn stated that Ad Hoc was asked to review the 1040 instructions they looked at it they said that they will put TAP in the publication, but not in the 1040 instructions.

Elevated Issue 3390-TAP 206--004 Envelope Issue-(Where's the IRS Response?)-(Bill Bly)

Started Feb 05 passed around, in 06 it was sent up from the Joint Committee to the IRS who in turned sent it to the Notices Committee who refused to deal with it. Then it kind of got lost. Nancy Ferree agreed to send it back to the IRS.

Outreach Events

17 for September, and Kim thanks everyone for their support.

Public Input

Someone asked to have outreach defined. Kim defined it. Joel Lawson asked what we look for in turn for a response from your outreach. Ed Johnson asked if TAP have resources for people to use for outreach. The answer is yes we do. When are the notices going out about the selection. Connie Sharpe asked about the TAC Survey. She wanted to know if this will be available in December. Peter Welch asked could a website be set up to invite people to join web talk. Nancy Ferree stated that he can be as creative as you want with outreach. He also asked about the issue of the 1099. He wanted to know if a member of the public to participated in or is it inclusive to members. Connie Sharpe also wants to be included in this issue. Nancy Ferree will send out a copy of the research report along with Paul Brubaker's contact information to all guests that are interested.

Closing Assessment/Q&A/Meeting Survey

Chair Lyn Sinnamon reminded everyone to fill out the meeting survey; this was a good meeting, and meeting was adjourned.

Next Teleconference Meeting: November 21, 2007 at 2:30 PM ET

***Certification: These minutes were approved by the TAP Area 2 committee, by consensus, on 11/21/2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Meeting Minutes**

**Committee's Teleconference Meeting
September 19, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Lois G. Lombardo, Local Taxpayer Advocate, Philadelphia, PA

Members Present

Bill Bly, Wayne, PA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Emilio Cecchi, North Bethesda, MD
Benson Chapman, Wayne, NJ
Blanche Davis, Rehoboth Beach, DE
Steve Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Carolyn Hutchinson, Fletcher, NC
Sonny Kasturi, West Orange, NJ
Paul McElroy, Bethania, NC
Lyn Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC

Members Absent

Paul Brubaker, York, PA
Michael Bryant, Oakton, VA
William Yaeger, Alexandria, VA

Staff Present

Nancy L. Ferree, Plantation, FL, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst & Note Taker

Guest(s) Present

Vladimir Turkeltaub, Enrolled Agent, NJ

Welcome & Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone.

Roll call was taken and quorum of 8 was met.

Joint Committee (JC) Report

Ben Chapman provided the following information from the Joint Committee's September 5, 2007 meeting: (Ben participated on Lyn Sinnamon's behalf)

- The TAP Director's report for this meeting is available on TAP Space.
- Where are the issues? There was only one issue approved at the JC to be elevated.
- Procedure for election of TAP Chair and Vice-Chair decision will be made at the next JC meeting. Discussion involved third year members who won't be at the annual meeting. The



new members can vote but they don't know who they are voting for. Many members favored the email election process prior to the annual meeting.

Chair Lyn Sinnamon followed with the following comments:

- There is money available for outreach thru the end of September 2007.
- The 2006 TAP Annual Report should be published soon.

Area 2 Dinner in Georgetown, DC on December 12, 2007

Send your ideas directly to Lyn via email. He has several suggestions but welcomes input from all.

Report on IRS Commissioners' Meeting

Ben Chapman shared that a small group of TAP Members met with Acting Commissioner Kevin Brown followed by a smaller group which met with Richard Morgante, Commissioner of Wage and Investment. Reports on this meeting are available on TAP Space. The meeting went well. Mr. Morgante thinks that TAP is important. Acting IRS Commissioner Linda Stiff wasn't at the meeting due to a prior commitment. Hopefully Messrs. Brown and Morgante will brief Ms. Stiff on all issues.

Ben pointed out that not only was Kevin Brown leaving the IRS, Richard Morgante, Commissioner of Wage and Investment was leaving.

Lyn mentioned that the handout prepared for the meeting with the IRS Commissioner can be used for outreach in the future.

Review/Confirm Meeting Minutes- August 15, 2007

These minutes were approved by consensus.

Where are the issues?

Lyn Sinnamon and Steve Fulkrod brought up a concern regarding on "How can we generate more issues?" Lyn suggested that the committee attempt to get issues resolved before the new year; also, third year members should pass all information to the remaining members.

Lyn also elaborated on the committee not getting discouraged; issues should be sent up regardless of how long it takes to elevate an issue.

Ben Chapman mentioned outreach experiences where citizen mention problems (personal ones) but not systemic issues.

Approve revised Proposal 3944; Instructions on Tax Treatment of Litigation Settlement

Proceeds- Sonny opened the floor for comments. All agreed by consensus to elevate this issue to the Joint Committee. (Ben Chapman and Carolyn Hutchinson will be added to this subcommittee since currently there are members on this team that will be rotating off this year)

Inez advised the committee that elevated Issue 4011, Form 8863, Education Credits, is currently on TAP Space in the Joint Committee's Discussion Folder.

Subcommittee Reports On Active Issues:

Issue 3997, Terminate "S" Election- Bob Haines indicated that he was awaiting responses back from the sub-committee. Kim and Ben indicated that they had responded back a while ago; Bob asked them to please re-send. Next month the sub-committee will update the entire committee.



Issue 4182, Standardization of 1099 Forms- Nancy Ferree shared that the sub-committee held a teleconference with IRS Subject Matter Experts and there are some legal issues involved; another teleconference is pending.

*Steve Fulkrod brought up that since Issue 3944 is being elevated, and there will be only 2 active issues for the committee to work on, it is time to bring out from Parking Lot status to Active status the following issues:

4155, Schedule D Carryover Losses, Subcommittee: Bill Bly, Ben Chapman, Sonny Kasturi, and Emilio Cecchi.

#3948, Form 944, Change Threshold, Subcommittee: Sonny Kasturi, Kim Brown, and Elizabeth Warnecki.

Review for Proper Closing Status on Responses Received from the IRS:

TAP 04-050, Issue 1309, Simplify Form 1041 Instructions- Committee agreed by consensus: Closed: Partially Accepted.

Sonny Kasturi suggested that there may be a new related issue to come out of this one. Bob Haines promised to review Form 1041 since it is a form he is very familiar with and will let the screening committee know if there is a potential for a new issue.

TAP 05-014, Issue 3392, Form 1065 Schedule D Changes- Committee agreed by consensus: Closed: Proposal Accepted.

TAP 206-017B, Issue 3634 Part 2, Schedule C-EZ Changes- Committee agreed by consensus: Closed: Proposal Rejected.

Outreach Events

Kim Brown reported that last month the committee had 22 outreach activities and this month so far there are only 7 on record. She encouraged members to conduct local outreaches in their communities.

A brief discussion was held on different ways to do outreach.

LTA Lois Lombardo shared the importance of coordinating efforts with your local taxpayer advocates who usually have a booth already at the events which can be shared with TAP Members.

Nancy Ferree reminded everyone that if they become aware of an event to just let the staff know.

Public Input

Enrolled Agent Vladmimir Turkeltaub from Northern New Jersey expressed an interest in volunteering next year to become a panel member and was interested in hearing during today's call what TAP was all about.

Closing Assessment/Q&A/Meeting Survey

Chair Lyn Sinnamon reminded everyone to fill out the meeting survey; this was a good meeting, and meeting was adjourned.

Next Teleconference Meeting: October 17, 2007 at 2:30 PM ET



***Certification: These minutes were approved by the TAP Area 2 committee, by consensus, on October 17, 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee's Teleconference Meeting
August 15, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Lois Lombardo, Local Taxpayer Advocate, Philadelphia, PA (Absent)
Nancy Ferree, TAP Program Manager (Acting DFO)

Members Present

Bill Bly, Wayne, PA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Paul Brubaker, York, PA
Michael Bryant, Oakton, VA
Ben Chapman, Wayne, NJ
Emilio Cecchi, N. Bethesda, MD
Blanche Davis, Rehoboth Beach, DE
Steven Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Sonny Kasturi, West Orange, NJ
Paul McElroy, Pfafftown, NC
Lynwood Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC

Members Absent

Carolyn Hutchinson, Fletcher, NC
William Yaeger, Alexandria, VA

Staff Present

Inez E. De Jesus, TAP Program Analyst
Anita Fields, Tap Staff Secretary & Note Taker

Guest Present

None

Welcome and Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone and asked TAP staff Anita Fields to take roll.

Quorum of (8) was met.

Joint Committee Report

Lyn Sinnamon reported that on 16 August members of TAP will be meeting with the Acting Commissioner along with his replacement with a copy of the 2006 TAP Annual Report. Ben Chapman asked will it be available to the rest of the TAP members. It will be available to be accessed online, but a hard copy will not.

Lyn express that in Bernie's report there are two more Tax Forums left. Lyn asked Nancy Ferree if Bernie had made a decision on his selection for his Secretary and Senior Analyst. He selected Patti Robb as his new Secretary, but has not made a selection on the Senior Analyst. Recruitment is on schedule.



Lyn also informed the committee that the Treasury/IRS has announced its 2007-2008 Priority Guidance of 303 projects and the link to the report would be made available to anyone interested in the report.

TAP Chair election process is being discussed. They are trying to decide when the elections will be held, how to nominate, if you can self nominate, etc. Lyn is asking for input on the procedure for electing Joint Committee Chair. He also expressed how important it is to update your bios on TAPSpace.

Review / Confirm Meeting Minutes: July 18, 2007

These minutes were approved by consensus.

New Issues (s)

Issue 4273, TAP information in Form 1040 Instructions

The screening sub-committee is recommending that this issue be transferred to the Ad Hoc Committee. Inez stated that last week the Forms and Pubs program owner asked the Ad Hoc Committee to review the instructions for the 1040. By consensus the Area 2 Committee agrees to forward to the Ad Hoc Committee. Ben Chapman and Lyn agreed to work with Ad Hoc Subcommittee on this issue. Deadline to respond is 8/31/2007.

Report on TAC Visits by Area 2 Committee Members since the Last Teleconference Meeting

Kimberly Brown reported that there have been no TAC visits.

Ben Chapman informed the committee that Nina Olsen mentioned the TAC visits performed by TAP in her Annual Report to Congress. TAC visits are one of her focuses for 2008.

Status Review on Revision of Draft Proposal 3944, Class Action Proceeds Instructions

Sonny Kasturi reported that the subcommittee has not done any work on this proposal and will work on it this month.

Sonny requested that Inez re-send the latest revision out to all the area committee members so that the committee can take a look at it and send their comments back to him. Sonny expects to finalize it after incorporating comments from the members and have it ready for the Sept meeting.

Consensus on Revision of Issue 4011 Form 8863 Education Credits

Elizabeth stated that the revision is out there for pre-read and she is just waiting on feedback. The consensus is that issue 4011 be elevated back to the Joint Committee.

Subcommittee Reports on Active Issues:

Issue 3997- Terminate "S" Election

The subcommittee should have something out by the next meeting.

Issue 4182- Form 1099-R Enhancements for seniors

Paul Brubaker has done research and found that Area 3 worked issue 3869 that addressed the fact that the Federal Government 1099-R Annuity Form uses a different format and numbering system than all other 1099-R forms. They forwarded to the program owner for the Form 1099R (Gilford Queen) - with the question the sub-committee wanted answered (why is OPM not required to follow the regular 1099 format?)

6/7/06 - received the following information from the program owner:

Filers are not required to use the official IRS information return to file with the Service nor to furnish a copy to the recipient. There are specifications for substitutes for both purposes. These specifications are set forth in Pub. 1179, General Rules and Specifications for Substitute Forms 1096, 1098, 1099, 5498, W-2 G, and 1042-S. This publication is updated annually. He asked Nancy Ferree to check to see who is the current contact regarding Pub 1179.



Nancy stated that if Paul's subcommittee would put something on paper and she will pass through Bob Erickson to ensure that they are going in the right direction.

Paul Brubaker will send email to see which committee members are interested in working this issue. He will then setup a conference call to work the issue.

Review for Proper Closing Status on Responses Received from the IRS:

TAP 206-017 Self Employed & Free Tax Prep:

The committee agrees to accept closed partially accepted.

TAP 206-028 Form 1099 Free Electronic Filing:

The committee agrees to accept closed partially accepted.

Outreach Events and Commitment Reports

Kimberly Brown reported 24 outreach activities this month came up 7 from last month.

Ben Chapman suggested that an outreach report can be with repeat persons if you spoke with after your initial contact.

Nancy stated that new success stories will be updated every six months per the Communications Committee.

Public Input

No public input.

Closing Assessments- Q & A Meeting Survey

Lyn expressed how important it is to review the draft minutes and provide feedback.

Nancy asked committee members to think about taking leadership roles if they are not rotating off this year.

Chair adjourned the meeting.

Next Teleconference Meeting: September 19, 2007 at 2:30 PM ET

***Certification of Meeting Minutes: These minutes were approved by the TAP Area 2 Committee by consensus on September 19, 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Meeting Minutes**

**Teleconference Meeting
July 18, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Lois G. Lombardo, Local Taxpayer Advocate, Philadelphia, PA

Members Present

Kimberly Brown, Blakeslee, PA, Vice-Chair
Michael Bryant, Oakton, VA
Ben Chapman, Wayne, NJ
Blanche Davis, Rehoboth Beach, DE
Steve Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Paul McElroy, Bethania, NC
Lynwood Sinnamon, Arlington, VA, Chair

Members Absent

Bill Bly, Wayne, PA
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Emilio Cecchi, North Bethesda, MD
Carolyn Hutchinson, Fletcher, NC
Sonny Kasturi, West Orange, NJ
Elizabeth Warnecki, Ladson, SC
Bill Yaeger, Alexandria, VA

Staff Present

Nancy L. Ferree, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst, & Note Taker

Guest(s) Present

None

Welcome and Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone present.

Roll call was taken and there was a brief discussion on quorum based on committee's by-laws which states "greater than 50%" - currently there are 15 members on this committee; committee agreed by consensus that quorum is "8".

Joint Committee Report

Chair Sinnamon briefly shared the following information from the face-to-face meeting in Denver:

- Regarding the "split refund", the TAP Chair expressed a concern that TAP may not fully understand our clients-citizens and the IRS. The split refund was not an issue at the Joint Committee, the lack of interest within the taxpaying public seemed to represent something that the IRS thought was great and didn't get much of a response from the public. TAP is now being asked to find out what the public thinks.



- Level of commitment of panel members.
- New elevated issues process.
- Attendance and Quorum issue
- Emeritus members to fill vacancies
- 2006 TAP Annual Report is late, but will be ready before the August 16, 2007 meeting with the Acting Commissioner.
- 2007 TAP Annual Report will be prepared soon to be ready by end of this year. There will be a new format used with the monthly reports.
- National Office Report: Bernie has set up a meeting on August 16, 2007, with the IRS Acting Commissioner.
- Interviews are going well.
- Vice-chairs may be invited to attend the Joint Committee's October 2007 face-to-face, all depends on the budget.
- Member effectiveness discussion.
- Outreach discussion.
- Leadership roles – think about it now if you are interested in being a Chair or Vice-chair of a committee next year.

Review/Confirm Meeting Minutes- June 20, 2007

These minutes were approved by consensus.

New Issues:

Screening Committee Chair, Steve Fulkrod, addressed the following new issues that were reviewed by his team on July 9, 2007:

- **Issue 4256, EFTPS Delay in Posting of Tax Payments** recommendation is to place in "Parking Lot" status behind the other Parking Lot issues. Committee agreed by consensus to accept.
- **Issue 4258, Third Party Designee-Extend Authorization More Than One Year** recommendation is to refer this issue to Area 3 which is already working this issue. Committee agreed by consensus to refer.
- **Issue 4260, Retirement Plans-Educate the Public** recommendation is to drop; a good idea but not an issue for TAP. Committee agreed by consensus to drop this issue.

*The next screening committee call is scheduled for August 6, 2007, at 3PM ET

Report on TAC Visits by Area 2 Committee Members Since the Last Meeting

Kim Brown had no visits; Blanche Davis did visit one Taxpayer Assistance Center in Delaware.

Blanche Davis took this opportunity to remind everyone to fill out the Returning Members and New Member surveys as soon as possible, if they have not already done so.

Chair Lyn Sinnamon mentioned that certificates are going to be mailed out to thank all members who are performing TAC visits.

Consensus to Drop Issue 3743, Revise Form W-9 this form was recently revised, and the IRPAC, Information Reporting Program Advisory Committee, recently made recommendations similar to area 2's. Committee agreed by consensus to drop this issue. (It may be re-visited in the future if there is a need)



Status on Revision of Draft Proposal 3944, Class Action Proceeds Instructions this will be moved to next month's agenda.

Status on Revision of Issue 4011, Form 8863, Education Credits this will be moved to next month's agenda.

Subcommittee Reports on Active Issues:

- **Issue 4061- Form W-4, Make it Easier for Minors** Mike Bryant shared that the taxpayer who submitted this issue was ultimately requesting that a new W-4 form be geared specifically for minors. Motion was made to drop this issue and the committee agreed by consensus to drop it.
- **Issue 4182- Form 1099-R Enhancements for Seniors** Paul Brubaker sent out an email earlier today sharing that he will be scheduling a sub-committee call for early August 2007. Discussion will be moved to next month's agenda.
- Since some active issues were closed during this call, **Issue 3997, Terminate "S" Election** will now be taken out of parking lot status and made active. It was confirmed that the subcommittee is composed of: Bob Haines, Kim Brown, Bill Yaeger, and Ben Chapman. **Issue 4155, Schedule D Carryover Losses** will remain in parking lot status.

TAP 206-017, Self-Employed & Free Tax Preparation- Review for Proper Closing Status The TAP Staff will be following up with Paul Brubaker to see what the proper closing status should be.

Action item for: Nancy and Inez

Outreach Events & Review of Mid-Year Commitments

Kim Brown shared that there were 13 outreach activities during the past month. This was a big drop from previous months. Kim reminded everyone that anytime you speak to someone regarding TAP that is an outreach event. Please let Inez know when you do these activities since it is very important that they be documented.

Kim requested that Nancy share with all the difference between an area and issue outreach. It was decided a while ago that all outreaches should be captured by the area committee.

Chair Sinnamon shared that he and Bill Yaeger had been contacted by a Washington Post reporter but neither one was able to converse with the reporter.

Public Input

None

Closing Assessment-Q&A

- Ben Chapman made comments on lack of participation by some members. Also, he suggested that members who don't contribute shouldn't go to the annual meeting.
- Mike Bryant suggested that a letter from the TAP Director be re-sent by email to all panel members to re-commit to the next year. This letter should require a "Yes/No" response.

Meeting Survey available on TAP Space.

Chair Lyn Sinnamon adjourned the meeting.



Action item(s):

- TAP Staff (Nancy/Inez) to follow-up with Paul Brubaker on proper closing status for Elevated Issue TAP 206-017.
- Chair Lyn Sinnamon will suggest via his Chair's Report to the Joint Committee that a renewal of commitment letter be sent out again.

Next Teleconference Meeting: August 15, 2007 at 2:30 PM ET

*** Certification of Meeting Minutes: These minutes were approved by the TAP Area 2 Committee by consensus on 15 August 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Committee's Teleconference Meeting
June 20, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Lois Lombardo, Local Taxpayer Advocate, Philadelphia, PA

Members Present

Bill Bly, Wayne, PA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Ben Chapman, Wayne, NJ
Blanche Davis, Rehoboth Beach, DE
Steven Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Sonny Kasturi, West Orange, NJ
Lynwood Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC

Members Absent

Paul Brubaker, York, PA
Michael Bryant, Oakton, VA
Emilio Cecchi, N. Bethesda, MD
Carolyn Hutchinson, Fletcher, NC
Paul McElroy, Pfafftown, NC
William Yaeger, Alexandria, VA

Staff Present

Inez E. De Jesus, TAP Program Analyst & Acting TAP Manager
Anita Fields, TAP Staff Secretary & Note Taker

Guest Present

None

Welcome and Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone and asked TAP staff Anita Fields to take roll. We have a new DFO, Lois Lombardo she was introduced and she told a little about her background.

Quorum of (9) was met.

Joint Committee Report

Issue 4011 didn't make it to Joint Committee and it has been returned to area 2 for revision. They discussed three issues from area 1, 6 and 7. There was a guest speaker present. He is in charge of publications. He wanted issues dealing with publication to be run by him before they are elevated. They discussed the upcoming face-to-face.

Chair Lyn Sinnamon asked the members of the quality review team to send him a personal email referencing if they had adequate training to do quality review. He will take that to the Joint Committee face to face meeting.



Review / Confirm Meeting Minutes: May 16, 2007

These minutes were approved by consensus.

New Issues (s)

Issue 4230, Extend Free File to All

After carefully reviewing, the screening committee is recommending that the issue be dropped at this time due to the current contract that the IRS has with free file participants.

Sonny Kasturi and Robert Haines stated that he disagrees with the recommendation.

The consensus was that the issue be placed in the parking lot and Sonny can independently work on the issue.

Report on TAC Visits by Area 2 Committee Members since the Last Teleconference Meeting

Kimberly Brown has completed Wilkesboro and Scranton. She had to make a second visit to Wilkesboro.

Blanche Davis visited TAC center in Georgetown, DE. She was interested in forms. They had plenty of forms.

Status Review on Issue 3743-Revise Form W-9 & Issue 3944, Class Action Proceeds

These issues were returned to us from the Joint Committee and Nancy Ferree is currently working on them. Nancy is not on the call today therefore we can't get a status.

Subcommittee Reports on Active Issues:

Issue 4061- Form W-4 Make it Easier for Minors

Blanche Davis is the lead. She is working on a conference call for next week. She needs to get a time when the members of the subcommittee will be available.

Issue 4182- Form 1099-R Enhancements for seniors

Paul Brubaker is the lead. Bill Bly stated that the subcommittee needs to set up a conference call. Currently the issue is being worked.

TAP 206-031 Household Employees-Consensus on Status:

Recommendation was to Close Partially Accept. The consensus of the committee is Closed Partially Accepted.

TAP 206-017 Self Employed & Free Tax Prep:

Paul Brubaker is lead but is not on the call. There have been emails circulating and committee decided to give Paul a chance to read and give an updated status at next month's meeting.

Outreach Events and Commitment Reports

Panel Member Kimberly Brown reported that there were 21 Outreaches for the Month of May. Elizabeth Warnecki completed a TAC visit as part of Outreach. She also reported on some information discussed at the Communication's meeting.

Elizabeth Warnecki stated that the Communication Committee would like for all new members to send back their new member survey. New TAP Space will come online 1 August 2007. It was suggested that all members update their Bio's on TAP Space and add photos. The new Vision Statement is out and it is suggested that this be added to your correspondence. The annual report for 2006 has been reviewed and completed and should be out by the end of June 2007. It was also suggested that members think of success stories-ways to enhance our presence at this year's tax forums.



Public Input

No public input.

Closing Assessments- Q & A Meeting Survey

Ben Chapman mentioned the absence of committee members. He wanted to know what they do when members don't show without notice. Chair Lyn Sinnamon advised that there are procedures in place to deal with non-attendance.

Chair adjourned the meeting.

Next Teleconference Meeting: July 18, 2007 at 2:30 PM ET

***Certification of Meeting Minutes: These minutes were approved by the TAP Area 2 Committee by consensus on July 18, 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee Meeting Minutes
Committee's Teleconference Meeting
May 16, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Frances W. Kleckley, Local Taxpayer Advocate, Columbia, SC

Members Present

Bill Bly, Wayne, PA
Paul Brubaker, York, PA,
Michael Bryant, Oakton, VA
Emilio Cecchi, N. Bethesda, MD
Ben Chapman, Wayne, NJ
Steven Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Paul McElroy, Pfafftown, NC
Lyn Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC

Members Absent

Kimberly Brown, Blakeslee, PA, Vice-Chair
Blanche Davis, Rehoboth Beach, DE
Sonny Kasturi, West Orange, NJ
Carolyn Hutchinson, Fletcher, NC
William Yaeger, Alexandra, VA

Staff Present

Nancy Ferree, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst
Isai Pallango, TAP Staff & Note taker

Guest Present

Janet Hennen, WV Program Analyst

Welcome and Roll Call

Chair Lyn Sinnamon opened meeting by welcoming everyone and asked TAP staff Isai Pallango to take roll.

Quorum was met.

Joint Committee Report

Chair Lyn Sinnamon announced Internal Revenue Service Commissioner Mr. Mark Everson resigned and temporarily replaced by Mr. Kevin Brown. Chair stated joint committee presented Gold Star Proposal, but was not well received. Sinnamon requested panel members to reply if any questions or comments arise.

It was stated Issue 4011- Form 8863 Education Credit has been elevated with panel members Warnecki, Brubaker, McElroy, and Hutchinson forming subcommittee.



Review / Confirm Meeting Minutes: April 25-27, 2007

These minutes were approved by consensus by all panel members.

Approval of issue(s) To Be Elevated To The Joint Committee:

Issue 4046-Use Last Four Digits of SSN on IRS notice

Panel member Steve Fulkrod currently working this issue and recommend dropping issue since it will be covered by the Notices Issue committee. All panel members agreed by consensus to drop issue.

TAP 206-014 Issue 3736 EFTPS Registration Process-Follow up Report

Bill Bly spoke to IRS Subject Matter Experts. Panel member Bly recommended issue be dropped / closed with partially accepted status. All panel members agreed by consensus.

New Issue(s) & Status Review of Parking Lot Issues in Priority Order

Issue 4182- Form 1099-R Enhancements for Seniors

Panel member Steve Fulkrod reported that the Steering Committee prioritized this issue as number one status. Panel members Paul Brubaker, Bob Haines, Emilio Cecchi and Bill Bly will form this subcommittee. All panel members agreed with this assessment.

Issue 3997- Terminate "S" Elections

Panel member Steve Fulkrod reported that the Steering Committee prioritized this issue as number two status. All panel members agreed with this assessment.

Issue 4155- Schedule D, Carryover Losses

Panel member Steve Fulkrod reported that the Steering Committee prioritized this issue as number three status. All panel members agreed with this assessment.

Issue 3948- Form 944, Change Threshold

Panel member Steve Fulkrod reported that the Steering Committee prioritized this issue as number four status. All panel members agreed with this assessment.

Issue 3946- Filing of Charitable Reminder Trusts

Panel member Steve Fulkrod reported that the Steering Committee prioritized this issue as number five status, but recommended issue be dropped with monitoring mode. All panel members agreed by consensus to drop issue with monitoring mode.

It was also noted that panel member Robert Haines will monitor issue.

Report on TAC Visits by Area 2 Committee Members

Panel members Blanche Davis and Kim Brown were not present for input on subject. Panel members Warnecki, Cecchi, and Brubaker shared their TAC outreach efforts. Analyst De Jesus will gather research information and forward to all panel members.

Status on Elevated Issue 3743- Revise Form W-9 & Instructions

Chair Sinnamon stated proposal has been elevated to Joint Committee and returned. TAP manager Ferree will assist with the editing of the proposal and will provide feedback in the future.

Subcommittee Reports on Active Issues:



Issue 4061-Form W-4 Make it Easier for Minors

Panel members Elizabeth Warnecki and Michael Bryant are current working this issue. It was recommended issue should not be directed to quality control department. All panel members agreed by consensus on this recommendation.

TAP 206-028 1099 Free Electronic Filing

TAP manager Nancy Ferree recommend issue be elevated to Mr. Rick Ware as recommended by Ms. Sue Sottile for action by IRS. This recommendation was originally elevated to Sue Sottile. All panel members agreed by consensus on this recommendation.

TAP 206-031 Household Employees

Analyst De Jesus stated issue currently on TAPSpace and requested all panel members to review and provide feedback. Panel members Cecchi and Kasturi will review and recommend closing status. All panel members agreed by consensus on this recommendation.

It was also stated Program Analyst Barbara Toy will be anticipating feedback / input.

Draft Proposal 3944- Class Action Proceeds Instructions: Update

Nancy Ferree had nothing to report due lack of time. It was noted that Ferree and TAP Staff currently ranking applications of possible new panel members. Kasturi and Ferree will re-write proposal.

Outreach Events & Commitment Reports

Analyst De Jesus shared 20 Outreach events were reported for the month of April. Panel member Steve Fulkrod shared his outreach event with Maryland Congressional representatives for the month of May.

Public Input

No public input

Closing Assessments- Q & A Meeting Survey

It was stated that panel member Judy Lester of North Carolina resigned. Panel member Ben Chapman also noted the resignation of three panel members during the year 2007. Chapman inquired the possibilities of recalling former member Beadsie Woo. Ferree and De Jesus will research and provide information in the near future.

Chair Sinnamon shared IRS Advisory Council currently looking for volunteers / tax professionals. Sinnamon asked all panel members to complete meeting survey and submit to De Jesus.

Chair adjourned the meeting

Next Teleconference Meeting June 20, 2007 @ 2:30 PM

***Certification of Meeting Minutes: These minutes were approved by the TAP**

Area 2 Committee by consensus on June 20, 2007.



**Taxpayer Advocacy Panel
Area 2 Committee Face-to Face
April 25, 2007
Raleigh, North Carolina**

Members in Attendance:

Bill Bly (present 4/25, 26 & 27)
Kimberly Brown (present 4/25, 26 & 27)
Paul Brubaker (present 4/25, 26 & 27)
Michael Bryant (present 4/25, 26 & 27)
Benson Chapman (present 4/25, 26 & 27)
Blanche Davis (present 4/25, 26 & 27)
Steve Fulkrod (present 4/25, 26 & 27)
Carolyn Hutchinson (present 4/26 & 27)
Sonny Kasturi (present 4/25, 26 & 27)
Judy Lester (present 4/25, 26 & 27)
Paul McElroy (present 4/25, 26 & 27)
Lynwood Sinnamon (present 4/25, 26 & 27)
Elizabeth Warnecki (present 4/25, 26 & 27)
William Yaeger (present 4/25, 26 & 27)

Members Absent:

Emilio Cecchi
JoAnn Davis
Robert Haines

Staff:

Frances Kleckley (DFO) (present 4/25, 26 & 27)
Nancy Ferree TAP Program Manager (present 4/25, 26 & 27)
Inez De Jesus TAP Program Analyst (present 4/25, 26 & 27)
Bernie Coston TAP Director (present 4/25, 26 & 27)
Anita Fields TAP Secretary (present 4/25, 26 & 27)

Guests:

Al Vinson SBSE Exam Territory Manager (present 4/26)
David Yeskoo Area Manager Stakeholder Liaison (present 4/26)
Neil Doroshenko Wage & Investment Territory Manager (present 4/26)
Avery Henline Tax Specialist, Free File Alliance (present 4/26)



Thursday, April 25, 2007

Welcome and Announcements

Chair Lynwood Sinnamon covered a few items in the Welcome. Issue 3743- did not pass Joint Committee. Subcommittee must re- do. Annual report concern- is in draft form and has been circulated to communication committee. TAP member Handbook- going to soon be published- it can be accessed on TAPSpace. Ben Chapman advised that issues to be elevated must go to the joint committee with adequate time for review. Kimberly Brown mentioned that the joint committee process of reviewing elevated issues is complicated and chaotic. Communication Strategy has been completed and all areas will receive a briefing from committee members. Members should think about how they want it delivered.

Roll Call

Quorum of 9 was met; 13 members were present.

Review/Approve Meeting Minutes- March 21, 2007

The minutes from the previous meeting were approved as written by consensus.

Recruitment Updates

Bernie Coston shared that the Recruitment for new panel members is going well. In total, 381 applications were received, none from Puerto Rico at this time. Interviews will begin 11 June and run through 29 June 2007.

Bernie Coston—Director's report

Commissioner resigned effective May 29, 2007.

Recruitment ends Mon April 30. He wants to encourage anyone who may qualify to apply. All applicants have received and email advising them to please submit their draft applications in final. Interviews start 06/11 and run through /6/29 2007. TAP Business Meeting will be held the week of December 10, 2007 at Fairmont in Georgetown. Improvements will be made on TAPSpace delivery and outreach workshops. Bernie also informed the panel that the TAP budget has been approved with very small reduction that will allow members to attend Tax Forums. Town Hall meetings—we had three (Brooklyn, NY, Omaha, NE, and Phoenix, AZ) they all went well. TAP Offices—McQuinn is on detail 120 days as LITC director. Kayla Walker is acting TAP manager in Milwaukee. TAP Annual report is in draft. The meeting with the outgoing Commissioner most likely will not happen, but we may meet with the acting Commissioner.

Meeting Objectives

Bernie Coston requested that the committee discuss (1) issue elevation process (2) current creation of Annual report and how it can be improved.

Accepting or Rejecting Responses

TAP 05-072—Closed, proposal partially accepted.

TAP 05-073—Follow-up response- 3475 pending review by TAP status. Keep issue open.

By the end of the meeting the committee agreed to Close- proposal rejected for TAP 05-073 (issue 3475).

TAP 206-014 (issue 3736) Keep open, response not acceptable, want to schedule teleconference with the person who responded.

TAP 206-020 (issue 3925)—Closed proposal partially accepted.



Screening Committee New Issues- Steve Fulkrod

Issue 4163—Drop, Issue 4135—Parking lot with follow-up January 2008,
Issue 4182—Parking and assign subcommittee, Issue 4155—Hold until 04/27 meeting, Issue 4046—
Parking, highest priority

Steve Fulkrod asked for another screening committee member since Lee Congdon resigned, Michael Bryant volunteered.

Issue 3944—Still active, Issue 3946—Parking and monitor, Issue 3997—Active, Issue 4011 (Form 8863- Education Credits)—Elevated, Issue 4061—Active.

Friday, April 26, 2007

(Quorum of 10 was met with 14 members present).

Guest Speakers

Al Vinson—Small Business/Self Employed (SBSE) Exam Territory Manager. He came and spoke with the committee about types of audits and trends in audit findings.

David Yeskoo—Area Manager, Stakeholder Liaison. He spoke with the committee about the Issue Management Resolution System (IMRS).

IMRS Q&A

Time was set aside for panel members to ask questions.

Neil Doroshenko—Wage and Investments (W&I) Territory Manager. He spoke with the committee about why people come to the TAC centers and who their customers are. He also gave information on the self help concept which is the new TAC model.

Avery Henline—Tax specialist, Free File Alliance. He spoke to the committee about partnering with the IRS and how they are trying to get it so that everyone can e-file.

Free File Q&A

Time was set aside for panel members to ask questions.

Subcommittee Breakout

Each subcommittee separated into their groups to discuss their individual issues that were assigned to them.

Outreach Activities Update—Kimberly Brown

Please get all outreach in to Inez De Jesus by 04/27/2007. Kim stated that one-on-one is just as good as a group outreach. For the month of Jan 20 outreaches, Feb 21, and Mar there was 27 outreaches. We are having success in outreach.



Saturday, April 27, 2007

(Quorum of 10 was met with 14 members present).

Administrative

Lyn Sinnamon opened the meeting. He made an announcement about Senator Akaka proposing bill to Congress reference free internet tax filing for all taxpayers.

Review Status of Elevated Issues

All members discussed the elevated issues spreadsheets and recorded status summary. Members brainstormed ways to keep track of issues elevated to the IRS when there has been no response. They also discussed other databases within the IRS and how TAP can gain more visibility of their issues and how TAP can get answers to issues elevated over the last three (3) years. Sonny Kasturi suggested putting all issues on IRMS and Mike Bryant suggested SAMS. Bernie Coston committed to everyone that by the Joint Committee's F2F in June 2007 he will have a response.

Review Recommendation Status Summary

Issue 3743 (Form W-9 & Instructions)—Active—was returned from Joint Committee for editing—Nancy, Inez and subcommittee
Issue 3944 (Instructions Class Action Proceeds)—Active—Nancy will send out within 30 days (class action)
Issue 3946 (Filing of Charitable Remainder Trusts) Parking
Issue 3997 Terminate "S" Election)—Parking—Ben Chapman and Bob Haines will research
Issue 4061 (Form W-4 Make it Easier to - Minors)—Active-- submitted to Area 2 Quality Review
Issue 4046 (Use Last Four Digits of SSN on IRS Notices)—Active-- submitted to Area 2 Quality Review
Issue 4182 (Form 1099-R, Enhancements for seniors)—Parking (#1)
Issue 4105 (Modify Instructions on 1040 Sch D Asset Sales)—Dropped
Issue 4135 (Form 8889, Health Savings Account (HSA's)—Dropped—sent to David Yeskoo
Issue 3951 (Pubs 560 & 590 Instructions-Simple IRA Rules)—Dropped
Issue 3685 (On Hold Wait Time All IRS Toll Free Lines)—Dropped
Issue 3228 (E-file Alternates and Interactive Forms)—Dropped
Issue 3868 (V)—Parking (monitor)
Issue 3948 (Form 944, Change Threshold)—Parking

TAP Space Overview

Judy Lester is having problems opening TAPSpace. She was told to contact Inez De Jesus and she will help her out. Everyone was encouraged to use TAPSpace to communicate, it is very effective.

Share Experiences with Tax Preparation

Panel members that were involved in tax preparations shared different experiences or problems they encountered during this tax season.

Wrap-up

Bill Bly asked about letter to welcome him from the treasury and wondered if Nina Olsen or someone will send him a thank you as he leaves.

TAP Member handbook has gone to publishing and we should have copies by first week in May.

Paul Brubaker suggested that answers to elevated issues be posted somehow to improveirs.org so previous members can know about answers once they leave panel.

Lyn Sinnamon advised all to get a separate email for TAP issues so as to stay informed.

Next Meeting via Teleconference: May 16, 2007 at 2:30 PM ET



***Certification: These minutes were approved by the TAP Area 2 committee by consensus on May 16, 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Meeting Minutes**

**Committee's Teleconference Meeting
March 21, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Frances W. Kleckley, Local Taxpayer Advocate, Columbia, SC

Members Present

Bill Bly, Wayne, PA
Paul Brubaker, York, PA,
Kimberly Brown, Blakeslee, PA, Vice-Chair
Ben Chapman, Wayne, NJ
JoAnn Davis, Scott Depot, WV
Blanche Davis, Rehoboth Beach, DE
Steven Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Sonny Kasturi, West Orange, NJ
Paul McElroy, Pfafftown, NC
Lyn Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC
William Yaeger, Alexandria, VA

Members Absent

Michael Bryant, Oakton, VA
Emilio Cecchi, N. Bethesda, MD
Lee Congdon, Washington, DC
Judy Lester, Chapel Hill
Carolyn Hutchinson, Fletcher, NC

Staff Present

Nancy Ferree, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst
Isai Pallango, TAP Staff & Note taker

Welcome and Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone and asked TAP staff Isai Pallango to take roll.

Quorum was met.

Joint Committee Report / Information from Chair Training

Chair Lyn Sinnamon stated that as of March 7, 2007 TAP budget has been approved. Tax forum and face to face meetings will proceed as plan. It was also stated that National State Town Hall meeting in Omaha will be held on March 22, 2007 and Phoenix Town Hall and Face-to-Face meeting on March 29, 2007.

TAP Staff announcements; Steve Berkey will be acting manager of Milwaukee for a period of 30 days and Plantation Florida TAP Manager Nancy Ferree was selected as a member of newly created TAS-EEO (Diversity Board).



It was also stated that TAP Recruitment will be open from March 19, 2007 and end on April 30, 2007. Chair asked all panel members to help in the process of selecting new members. Current panel members were asked to respond by email if they wish not to continue serving TAP membership beyond 2007.

TAP Manager Nancy Ferree shared her enthusiasm of the newly created TAS-EEO. The nation wide committee will focus of diversity and equal employment opportunity. Ferree will be working with members and segments of all populations.

Review / Confirm Meeting Minutes: February 21, 2007

These minutes were approved by consensus by all panel members.

New Issue(s)

Issue 4071- Form 8913 Citizen Unable to Obtain Answers

Recommendation was to drop issue. Panel members agreed by consensus to drop this issue.

Issue 4061-Form W-4: Make Easier to Understand for Minors

Panel member Steve Fulkrod recommended issue made active. Panel members Elizabeth Warnecki and Bob Haines will serve on this subcommittee.

Issue 4105-Modify Instructions on 1040 SCH. D Asset Sales

Panel member Steven Fulkrod stated that the screening committee met and recommends that this issue be active, but placed in parking lot with monitoring mode.

Issue 4093-IRS Tax Forms Distribution Policy

Recommendation was to drop issue. Panel members agreed by consensus to drop this issue.

Issue 4086-Form SS-4 Processing

Recommendation was to drop issue. Panel members agreed by consensus to drop this issue.

Report on TAC Visits by Area 2 Committee Members

Panel members Blanche Davis and Kim Brown shared their visits with local TAC office. Panel member Davis stated experience was negative help from TAC office employee/manager. Panel member Kim Brown shared her second TAC office visit and completions of surveys. Her experience was positive.

Panel member Paul Brubaker shared his positive experience within his local TAC office.

Status on Elevated Issue 3743- Revise Form W-9

This proposal has been elevated to the Joint Committee; and Chair Sinnamon invited Bob Haines to attend the next JC meeting on April 4, 2007 at 1pm to address any questions that may arise.

Subcommittee Reports on Active Issues:

- Issue 3946- Filing of Charitable Remainder Trusts

Panel members Robert Haines and Elizabeth Warnecki serve on this subcommittee. Subcommittee is still waiting for report from the IRS. All panel member agreed by consensus.

- Issue 3997-Terminate "S" Election



Panel members Robert Haines and Elizabeth Warnecki serve on this subcommittee. Subcommittee is working this issue. Information will be shared during next month teleconference meeting. All panel member agreed by consensus

- Issue 4011-Form 8863 Education Credits

Panel member Warnecki submitted draft to subcommittee and received positive feedback. Warnecki will continue to work on this issue and submit for quality review. All panel members agreed by consensus.

Draft Proposal 3944- Instructions Class Action Proceeds: Update

Panel member Sonny Kasturi stated he will continue working on this issue after tax season and remain in active status. All panel members agreed by consensus.

Outreach Events & Commitment Reports

Panel member Kimberly Brown stated that 21 outreach events were recorded for the month of February. Brown stated that she would like more panel member involvement in the future.

Q&A Upcoming Face-To-Face Meeting Agendas Ideas

Panel member Sonny Kasturi suggested a report / update of issues sent to Joint Committee within the Internal Revenue Service. Robert Haines suggested proper TAPSpace usage technique. Panel members should contact Ferree and De Jesus if questions or comments.

Public Input

No public input

Closing Assessments- Q & A Meeting Survey

Chair Sinnamon requested comments and suggestions be directed to De Jesus.

TAP Manager Nancy Ferree asked the committee to fill out the meeting survey.

Chair adjourned the meeting.

Next Meeting: Face to Face in Raleigh, NC- April 25-27, 2007

***Certification of Meeting Minutes: These minutes were approved by the TAP Area 2 Committee, by consensus on April 25, 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Meeting Minutes**

**Committee's Teleconference Meeting
February 21, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Frances W. Kleckley, Local Taxpayer Advocate, Columbia, SC

Members Present

Bill Bly, Wayne, PA
Michael Bryant, Oakton, VA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Ben Chapman, Wayne, NJ
Emilio Cecchi, N. Bethesda, MD
Lee Congdon, Washington, DC
Blanche Davis, Rehoboth Beach, DE
JoAnn Davis, Scott Depot, WV
Steven Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Carolyn Hutchinson, Fletcher, NC
Sonny Kasturi, West Orange, NJ
Judy Lester, Chapel Hill
Paul McElroy, Pfafftown, NC
Lyn Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC
William Yaeger, Alexandria, VA

Members Absent

Paul Brubaker, York, PA

Staff Present

Inez E. De Jesus, TAP Program Analyst & Acting TAP Manager
Isai Pallango, TAP Intern
Anita Fields, TAP Staff Secretary & Note Taker

Guest Present

David Yeskoo, Stake Holder Liaison

Welcome and Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone and asked TAP staff Isai Pallango to take roll. TAP manager Nancy Ferree will not be joining this meeting since she is currently in New Orleans attending area 3 meeting. It was noted that IRS Program Owner David Yeskoo will be joining this teleconference meeting and TAP Acting Manager introduced new secretary Mrs. Anita Fields.

Quorum of (10) was met.

Joint Committee Report

Chair Lyn Sinnamon stated that only Area 1 had elevated issues. He also informed us that the Annual Business meeting is going to be held tentatively the week of December 10, 2007. Lyn Sinnamon also



shared information on the town meeting that is being held in Brooklyn New York on or about the 6th of March. It will be a televised meeting.

Chair Sinnamon introduced our guest David Yeskoo. He had discussions on ways that Mr. Yeskoo can partner with TAP and work some issues that the taxpayers may have.

Partnering Opportunities for TAP & Communication / Liaison

Guest David Yeskoo gave an overview on what the Stakeholder Liaison does and how we (TAP) can partner with them. He also extended an invitation to attend a meeting in Baltimore where the Deputy Commissioner of SBSE Brady Bennett will be speaking. The meeting will be held on March 7, 2007. David Yeskoo promised to send additional information on the meeting place and time

Review / Confirm Meeting Minutes: December 12, 2006: January 17, 2007

These minutes were approved by consensus.

New Issues (s)

Issue 4061, Form W-4, Make Easier to Understand for Minors

Steve Fulkrod and appointed subcommittee recommended issue to become active after reviewing the form. After discussing current active and parking lot issues it was decided to place Issue 4061 in the parking lot with the intent of making it active.

Revisit Issue 3228- E-File

Steve Fulkrod stated that no one from the existing sub-committee has contacted him on Issue 3228 (Free e-file for taxpayer who make under 52,000), so he and Emilio deferred it to the existing subcommittee.

Chair Sinnamon stated that Paul Brubaker is working that issue and just couldn't be on the call.

Report on TAC Visits by Area 2 Committee Members since the Last Teleconference Meeting

Blanche Davis visited TAC Center in Delaware. Her goal was to receive 20 customer surveys; she was only able to get 16. She has another visit planned for March 7, 2007. Blanche's biggest issue is there is no receptionist to direct customers and keep them from unnecessary waiting.

Kim Brown visited the TAC office in Pennsylvania February 13th. She did meet her goal of 20 customer surveys. She stated that the staff was helpful and nice. Forms were outside and alphabetized which reduced lines. Kim also stated that she will be going to Scranton next month.

Confirm Approval of Issue 3743-Revise Form W-9

Inez De Jesus reported that Nancy Ferree has re-written the proposal and shared with the subcommittee. Chair Sinnamon requested that the proposal be added to the Joint Committee's agenda for March 7th. He also invited Bob Haines to attend the teleconference in order to address any questions. After discussing the new proposal it was concluded that Issue 3743 will go to the Joint Committee.

Subcommittee Reports on Active Issues:

Issue 3946- Filing of Charitable Remainder Trusts

Ben Chapman shared that this issue has been reviewed by the IRS and Issue Management Resolution System (IMRS) concluded that they are not going to revise the form. Panel discussed the issue with whether to continue to continue to address it or not. It was concluded that Inez will distribute the IMRS report with the panel members.

Issue 3997- Terminate S Election

Panel member Ben Chapman a member of the subcommittee stated after the subcommittee reviewed



the issue it was determined that they did not want to create a new form. They decided to try to come up with ways of just adding a new block.

Issue 4011- Form 8863 Education Credits

Panel member Elizabeth Warnecki, sent out a draft proposal to the subcommittee to change form. Elizabeth is still waiting on feedback from subcommittee. Elizabeth wanted to know how many of Form 8863 is filed each year.

Confirm Change of Meeting Dates for Face-to-Face Meeting to Wednesday-Friday April 25-27, 2007

Chair Lyn Sinnamon just confirmed the dates of the Face-to-Face in April in Raleigh, NC.

Outreach Events and Commitment Reports

Panel Member Kimberly Brown reported that there were 30 Outreaches for the Month of January. She also stated that she needs for panel members to send her their commitments.

Public Input

No public input.

Closing Assessments- Q & A Meeting Survey

There were no closing assessments

Chair adjourned the meeting.

Next Teleconference Meeting: March 21, 2007 at 2:30 PM ET

***Certification of Meeting Minutes: These minutes were approved by the TAP Area 2 Committee by consensus on March 21, 2007.**



**Taxpayer Advocacy Panel (TAP)
Area 2 Committee
Meeting Minutes**

**Committee's Teleconference Meeting
January 17, 2007 @ 2:30 PM ET**

Designated Federal Official (DFO)

Frances W. Kleckley, Local Taxpayer Advocate, Columbia, SC

Members Present

Bill Bly, Wayne, PA
Paul Brubaker, York, PA,
Michael Bryant, Oakton, VA
Kimberly Brown, Blakeslee, PA, Vice-Chair
Ben Chapman, Wayne, NJ
Emilio Cecchi, N. Bethesda, MD
Lee Congdon, Washington, DC
Blanche Davis, Rehoboth Beach, DE
Steven Fulkrod, Bel Air, MD
Robert Haines, Lebanon, NJ
Sonny Kasturi, West Orange, NJ
Judy Lester, Chapel Hill
Paul McElroy, Pfafftown, NC
Lyn Sinnamon, Arlington, VA, Chair
Elizabeth Warnecki, Ladson, SC
William Yaeger, Alexandria, VA

Members Absent

JoAnn Davis, Scott Depot, WV
Carolyn Hutchinson, Fletcher, NC

Staff Present

Nancy Ferree, TAP Program Manager
Inez E. De Jesus, TAP Program Analyst
Isai Pallango, TAP Staff & Note taker

Welcome and Roll Call

Chair Lyn Sinnamon opened the meeting by welcoming everyone and asked TAP staff Isai Pallango to take roll.

Quorum of 10 was met.

Joint Committee Report / Information from Chair Training

Chair Lyn Sinnamon shared information on 2-day Chair training held in Dallas Texas. It was stated that TAP Director Bernie Coston and National Taxpayer Advocate Nina Olson will develop a Vision Statement and information will be shared in the near future. It was also stated that single solutions for issues are better than multiple solutions.

Chair Sinnamon requested Area 2 panel members complete working current issues and move on to new issues. He also stated that Joint Committee Monthly Teleconference meetings are open to all



members, and he encouraged that area 2 members attend. TAP Manager Nancy Ferree agreed with this request.

Suggestion from the Chair for all Members to Make a Personal Goal for the year Regarding TAP and Outreach

Chair Lyn Sinnamon shared that "Outreach" should be a fixed commitment and all panel members should complete a "Personal Goal Document" and submit to Vice-Chair Kimberly Brown. Sinnamon requested that Area 2 panel members perform two or three outreach activities per month.

DFO Frances W. Kleckley stated she will share a published news article concerning a new TAP member from Iowa that could be used as a model for all panel members to follow. .

Review / Confirm Meeting Minutes: December 12, 2006

These minutes will be approved during next month's call.

New Issues

Issue 4046-Use Last Four Digits of SSN IRS Notices

Panel member Steven Fulkrod stated that the screening committee met and recommends that this issue be placed in parking lot with monitoring mode. The screening committee learned that the IRS is currently in the process of creating a team to deal with identity theft and specifically, with getting rid of the Taxpayer Identification Number (TIN) on correspondence. Once this team begins to address this matter, the TAP Notices Issue Committee will be contacted for help and Area 2 has 3 panel members who are on the Notices committee. The entire committee agreed by consensus to accept this new issue and place in Parking Lot status with monitoring mode.

Poll Members with Taxpayers Assistance Center (TAC) Experience from Area 2 for Area 3 Project.

Panel member Blanche Davis shared information on meetings with Area 2 and Area 3 concerning TAC issues. Davis shared her visit to a TAC office and found it lacking proper information. Panel member Davis stated all panel members should visit their local TAC offices and report information with other members during next month's teleconference meeting.

Issue 3743-Revise Form W-9

TAP Staff reported that this proposal has not been revised yet.

Revisit Issue 3228- E-File Alternatives and Interactive Forms

Panel member Elizabeth Warnecki is currently working on this Parking Lot issue. Warnecki shared that she is still monitoring issue and searching for new developments that IRS is making in regards to E-filing user friendly opportunities. Warnecki thinks monitoring is best option. All panel members agreed by consensus to use TAP Space as a discussion forum for this issue.

Review Issues Matrix Active & Parking Lot Issues

Program Analyst De Jesus stated that a new matrix spreadsheet was sent to all panel members. It was stated that issues 3946, 3997, and 4011 are currently in active status. Issue 3944 draft proposal has been returned and currently being re-drafted by the sub-committee. De Jesus asked panel members for questions or comments, but none were raised.

Confirm Subcommittee Participants

Issue 3946- Filing Of Charitable Remainder Trusts

Panel members Robert Haines, Bill Bly, William Yaeger, Sonny Kasturi, and Judy Lester will serve on this subcommittee. All panel members agreed by consensus.



Issue 3997- Terminate S Election

Panel members Robert Haines, Kim Brown, William Yaeger, and Ben Chapman will serve on this subcommittee. All panel members agreed by consensus.

Issue 4011- Form 8863 Education Credits

Panel members Elizabeth Warnecki, Paul Brubaker, Paul McElroy, and Carolyn Hutchinson will serve on this subcommittee. All panel members agreed by consensus.

Outreach Events and Reports

Chair Sinnamon stated panel members should track expenses related to outreach events and report to TAP Analyst De Jesus. Panel member Kim Brown shared her outreach event with local cub-scout group. Panel member Paul McElroy requested VITA members to discuss TAP with their groups.

Public Input

No public input.

Closing Assessments - Q & A Meeting Survey

Sonny Kasturi provided a status report on Issue 3953, IRS Completing Simple Returns that had been sent to the TAP Area 7 Committee. A draft proposal is in pending status.

Chair Sinnamon reminded the committee to fill out the meeting survey.

Chair Sinnamon shared that he was looking forward to working with the Area 2 Committee and he provided Joint Committee call-in numbers.

Chair adjourned the meeting.

Next Teleconference Meeting: February 21, 2007 at 2:30 PM ET

***Certification of Meeting Minutes: These minutes were approved by the TAP Area 2 Committee by consensus on February 21, 2007.**