

2011 Meeting Minutes Area 2

- September 21, 2011
 - August 17, 2011
 - July 20, 2011
 - June 15, 2011
 - May 18, 2011
 - April 20, 2011
 - March 16, 2011
 - February 16, 2011
 - January 19, 2011
-

Area 2 Issue Committee Wednesday, September 21, 2011 Teleconference 2:30 p.m. – 3:30 p.m.

Designated Federal Official, DFO

- Lombardo, Lois – Acting Designated Federal Official,

Committee Members Present

- Boyle, Raymond
- Cain, David, Chair
- Feng, Andrew
- Johnson, Francis
- Lees, John
- Matthews, Theresa
- Silva, Michael
- Thomas, Donald, Vice Chair
- Webber, Erica
- Webster, Walter

Committee Members Absent

- Acero, Antonio
- Bekolo, Paulette
- Flanders, Seth
- Miller, Ernest

TAP Staff

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

Public Participants

- Collins, Shawn – Director TAP

Welcome/Announcements

Chair Cain welcomed everyone to the call.

TAP Director's comments on the final Area 2 teleconference

Collins welcomed everyone to the last Area 2 teleconference call and thanked the members for their passionate and committed efforts to serve as TAP members. She also thanked those members that are rotating off of TAP at the end of November.

DFO Report

Lombardo welcomed everyone to the call. She stated that the National Taxpayer Advocate (NTA), Nina Olson, has informed IRS Division Commissioners that effective October 1, certain cases that are classified as “systemic burden criteria” will not be taken into TAS’ inventory. Olson’s decision is based on the increasing inventory. She has direct TAS to focus their efforts on those cases that are creating an economic burden for taxpayers.

IRS Responses

Johnson the original author of the following issues has accepted the responses from the IRS:

- Issue #17932A – IRS should provide a Link to Instructions for Back Year Returns. (Partially Accepted)
- Issue #17932B – Publication Insertion of Back Year Returns. (Partially Accepted)
- Issue #17932C - Centralization location for Back Year Tax Returns. (Partially Accepted)

Issue Discussion

- Issue #17259 - 1040 File-able PDF – Boyle will submit the final version to Analyst Jenkins. Jenkins will review and submit to the Joint Committee, JC.
- Issue #17854 - Obtain Election Confirmation will be on the JC’s Agenda on September 22 meeting.

Issue #19155 Notice #1400 – Analyst Jenkins stated that the JC thought that the issue was very good issue. She also stated that the JC suggested that the forms and publications attachment for the proposal be combined with Area 4’s Committee work. Jenkins informed Matthews that she has rewritten some portions of the proposal and will email it to her today.

TAP Refocus – Area 2

Analyst Jenkins thanked all members including non-returning members on behalf of Morizio for their dedication and participation. TAP looks forward to working with them again in the future.

Outreach Round Robin

Lees will be making a 15 minute presentation to an audience of 250 people on TAP at an SBSE Senior Liaison group in Pittsburg, PA on September 22.

Lees stated that he performed an outreach recently and was approached by a taxpayer on the subject of bonus payment taxability as a result of signing a Marcellus Shale Lease Agreement. The taxpayer mentioned that he was unable to find any information on the IRS website that provides guidance to taxpayers signing those lease agreements.

Action Item

Lees will write up the issue on Bonus Taxability Payment on Marcellus Shale Leasing Agreement and submit to Jenkins. Jenkins stated that she will provide Lees with the appropriate information to enable the taxpayer to make his payments timely.

Public Participation

None

Closing

Cain thanked members for joining the last teleconference call. He stated that he enjoyed working with the committee and thanked the members for the work they have done on various projects.

Next meeting

This was the final Area 2 teleconference call. Third year members will be rotating off in November.

**Area 2 Issue Committee
Wednesday, August 17, 2011
Teleconference
2:30 p.m. – 3:30 p.m.**

Designated Federal Official, DFO

- Juncewicz, Tina – (Absent)

Committee Members Present

- Acero, Antonio
- Feng, Andrew
- Flanders, Seth
- Johnson, Francis
- Matthews, Theresa
- Miller, Ernest
- Silva, Michael
- Thomas, Donald, Vice Chair
- Webber, Erica
- Webster, Walter

Committee Members Absent

- Bekolo, Paulette
- Boyle, Raymond
- Cain, David, Chair
- Lees, John

TAP Staff

- Babb, Rose A.
- Jenkins, Audrey
- Morizio, Louis (Acting DFO)
- Odom, Meredith

Public Participants

- Collins, Shawn – Director TAP
- Gambardella, Linda – TAP Member
- Walker, Thomas – TAP Chair

Welcome/Announcements

Vice Chair Thomas welcomed everyone to the call.

TAP Refocus Update

TAP Chair Walker welcomed everyone to the teleconference and covered the points in the PowerPoint presentation sent to panel members as a pre-read for this meeting:

- The National Taxpayer Advocate, Nina Olson has asked TAP to reduce its membership from 102 to 74. The 74 members will be aligned with the number of LTA offices in the TAS organization.
- The Joint Committee for 2012 will consist of the TAP Chair, Vice Chair, the Screening Committee Chair and the Chairs of the Project Committees.
- TAP analysts will be assigned one Project Committee. The Project Committees will handle both IRS assigned projects and grassroots issues.
- The Joint Committee has decided that the Area Committees will no longer exist.
- The Communications Committee will become an Ad Hoc Committee

DFO Report

Morizio welcomed everyone to the call and gave the DFO Report. He stated the following:

- Since Maryland has one Local Taxpayer Advocate, panel member Sharpe will not be replaced. Panel member Silva will be the only member representing the state.
- Since there will be no more area committees under the TAP's Refocus, DFO Juncewicz expressed some concerns on the utilization of DFOs
- TAP Managers and some staff will meet in Brooklyn, New York in September for a Direct Report Meeting. The meeting's primary discussions will be on the TAP Refocus concerns.

Outreach Roundtable

Linda Gambardella, panel member from Area 1 joined the call and discussed some outreach tips. She mentioned the following:

- When performing outreach activities, avoid discussions on tax law and other specifics on individual tax cases. Keep the focus on TAP's mission, reaching out to taxpayers.
- If you are a tax preparer or tax attorney, you should not discuss your profession but rather, focus on reaching out to taxpayers and delivering the TAP message.
- When arranging outreach activities, it is imperative to work in conjunction with the Taxpayer Advocate Service (TAS). Gambardella stressed that combining an outreach with the TAS division makes the outreach very effective.

Public Participation

None

Closing

Morizio reminded panel members to use the spreadsheet format sent via email from Odom to submit outreach activities. In addition, he asked members to submit their outreach on a "monthly" basis for Odom to enter into the database.

Thomas thanked members for joining the teleconference call.



Next meeting

Wednesday, September 21, 2011 at 2:30 p.m. EST.

**Area 2 Issue Committee
Wednesday, July 20, 2011
Teleconference
2:30 pm – 3:30 p.m.**

Designated Federal Official

- Juncewicz, Tina, North Carolina, LTA

Committee Members Present

- Acero, Antonio
- Cain, David, Chair
- Feng, Andrew
- Flanders, Seth
- Johnson, Francis
- Matthews, Theresa
- Miller, Ernest
- Silva, Michael
- Thomas, Donald, Vice Chair
- Webber, Erica
- Webster, Walter

Committee Members Absent

- Bekolo, Paulette
- Boyle, Raymond
- Lees, John

TAP Staff

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

Members of the Public

- Beazley, Doug, Supervisory, Financial Management Specialist, Wage & Investment
- Shupe, Bill, Supervisory, Financial Management Specialist, Wage & Investment

Welcome/Announcements

Cain welcomed everyone to the teleconference call

DFO Report

Juncewicz welcomed everyone to the call and stated the following:

Due to non-filing of the appropriate Form 990, *Return of Organization Exempt From Income Tax*, by organizations, the IRS has revoked exemption status for thousands of organizations. Juncewicz mentioned to members that if taxpayers approach them during their outreach activities stating that they no longer have exemption status; they should be referred to the IRS.gov website www.irs.gov selecting the tab “Charities and Non-Profits”.

Collection Process

Issue#17154 - System Reminder for Collection Hold. (TAP has identified both long and short term solutions to the issue of Notice Hold).

Thomas and Feng stated that while there may be IRM procedures for collection holds in place, there may be a disconnect between the IRM and employees in following those procedures. Feng suggested that training should be given to IRS employees to ensure that the IRM procedures are actually practiced

Beazley and Shupe stated that the IRM systems and procedures in place are good. Beazley mentioned that his department is willing to take a look at specific situations of taxpayers to determine where the problem lies.

Beazley stated that there is an electronic guide in place to remind employees what they need to do when they are handling certain procedures with taxpayers' accounts. Morizio stated to Beazley that those procedures in the IRM should be followed as closely as possible.

Issue# 18165 – Recommendation for Revocation or Withdrawal of Form 2848, Power of Attorney and Declaration of Representative was accepted by the IRS.

Outreach Discussion

Morizio stated that a look at previous years' reports has shown that members have traditionally been one of the largest sources of TAP issues. He mentioned that there has been a sharp decline in those outreach activities and in bringing issues in to the TAP. He asked the members to comment on what could have caused the sharp decline.

Analyst Jenkins stated to members that she would like to assist them with improving their outreach activities. Jenkins asked that they members send her the list of places they conduct outreach activities; she will contact those organizations to facilitate subsequent outreach events with their counter parts in the other Area 2 states.

Morizio reminded members that it is imperative that they submit their outreach activities to Odom in the spreadsheet format that was sent to them via email. Morizio asked the members to complete each field in the spreadsheet. The information in each field is important for Odom to enter into the database. The outreach activities are subsequently submitted to the Joint Committee and are included in the TAP's Annual Report.

Thomas mentioned that members can contact organizations in their areas that have teleconferences and request to join them. Thomas stated that he has found that this method of delivering outreach is more productive and cost efficient than traveling to organizations.

Juncewicz mentioned to members that beginning October, November and December, LTAs will be hosting a number of outreach events. Morizio reminded members that contact information for both panel members and LTAs were exchanged at the beginning of 2011. In addition, Juncewicz stated that she plans to discuss with both Stakeholder Partnership Education and Communication, (SPEC) – Wage and Investments Division, (W&I) and Stakeholder Liaisons, Small Business Self Employment, (SBSE) how TAP can participate in their outreach events

TAP Refocus (How will TAP operate going forward?)

Morizio stated that next week, July 25 – 27 he will be attending the Joint Committee meeting in Seattle, Washington along with Cain, Garant, Miller and Webber.

Cain mentioned if members have not submitted their TAP member refocus survey, they should send the survey via email to him, Jenkins and Morizio.

Recruitment Update

TAP interviews have been completed thanks to the members that participated in the interview process for new TAP members. Some applicants withdrew their applications due to time requirements for TAP activities, but there still were good qualified applicants left. TAP staff is now waiting to receive the Tax Check Waiver Forms along with the Fingerprint Checks results. Assuming that those results are good, the applicants' names will be sent to National Taxpayer Advocate, Nina Olson and subsequently to the Treasury Department who will make the final selection of applicants to the TAP.

Public Participation

None.

Closing

Analyst Jenkins asked members to take a look at the Report of Parking Lot issues sent via email. She asked members for their suggestions on how they think the bucket names should be categorized using primary and secondary categories.

Next meeting

Wednesday, August 17, 2011 at 2:30 EST.

**Area 2 Issue Committee
Wednesday, June 15, 2011
Teleconference
2:30 p.m. – 3:30 p.m.**

Designated Federal Official

- Juncewicz, Tina, LTA, North Carolina

Committee Members Present

- Boyle, Raymond
- Cain, David, Chair
- Feng, Andrew
- Johnson, Francis
- Lees, John
- Miller, Ernest
- Silva, Michael
- Thomas, Donald, Vice Chair
- Webber, Erica
- Webster, Walter

Committee Members Absent

- Acero, Antonio
- Bekolo, Paulette
- Flanders, Seth
- Matthews, Theresa

TAP Staff

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

Welcome/Announcements

Cain welcomed every one to the teleconference call.

DFO Report

Juncewicz welcomed everyone to the call and mentioned the following:
National Taxpayer Advocate, Nina Olson testified before Congress last week. She asked the Senate not to reduce IRS appropriations in the next budget. Juncewicz mentioned to members that they can refer to Publication 4134 Low Income Taxpayer Clinic list for contact and locations of clinics for outreach activities.

Subcommittee Report Out **Flanders reported for Team A**

Issue# 17854 - Obtain Election Confirmations, was accepted by the Joint Committee.

Issue# 17081- Toll-Free Numbers location in the Instructions of Form 1040 Series was rejected by the IRS; the full committee has accepted the IRS response.

Boyle reported for Team B

Issue# 19687- Advocacy for Taxpayers Abroad, is being worked on by Boyle's subcommittee. Morizio mentioned that this issue was discussed with the TAP website contractors who will work on this as a priority. That means that taxpayers living abroad will be able to leave web comments on Improveirs.org.

Miller reported for Team C

Issue# 19605 - ID Theft, this issue will be sent to Analyst Jenkins to be submitted for approval at the Joint Committee Meeting in June.

IRS Responses

Issue# 16726 -Telephone Numbers on Information forms - IRS Chief Counsel is still reviewing this issue. Jenkins mentioned to the members to consider placing this issue in a monitoring status.

Issue# 16752 - Authority of Un-enrolled Preparers - this issue was accepted by the IRS.

Issue# 16718 -Timely Acknowledging of Taxpayer Receipt of Submission - the IRS response to TAP states that they are already using most of the recommendations suggested by TAP members.

Issue# 17154 - Systemic Reminder for Collection Hold - this issue was rejected by the IRS. The full committee has asked to discuss the issue further. Jenkins will contact William B. Shupe, Subject Matter Expert to join the next teleconference call to revisit this issue.

Issue for Approval

Issue# 19234 - Trucker Expenses Disallowed - Cain commented on Sharpe's proposal on the issue, that the standard mileage deduction should be used by truckers. Cain stated that the standard mileage deduction appears to be legislative and suggested to the committee that this issue be researched further. Morizio stated that his analysts will research this issue and report back to members if it is regulatory or legislative.

Issue# 19233 –SSB (Social Security Benefits) 1099 Misleading Wage and Income Transcripts - Cain commented that Box 3 is not the appropriate box for reporting income on tax returns. He stated that Box 5 is the appropriate box to be used when reporting income on a tax return.

TAP Refocus (Joint Committee Face to Face Meeting in Seattle, WA)

Morizio asked members to refer to the vision of TAP memorandum from TAP's Chair Thomas Walker. Part of Walker and Kim's vision for TAP is to assign the area committees to take over the project committee's responsibility. He mentioned that if members have any comments and suggestions on the TAP refocus, it is imperative to submit their comments before the JC's face to face meeting. Morizio asked members to address their comments to Walker and Vice Chair Kim.

TAP Outreach/Best Practice

There were no outreaches; however, Morizio discussed the importance of outreach. When one of the members asked how Area 2 compares to Area 1 Morizio mentioned that Area 1 committee is more involved with outreach than Area 2. Members should concentrate their outreach efforts on local community organizations, contacting the Local Taxpayer Advocates, and their local media. Thomas mentioned some of his outreach techniques. He stated that he joins outreach teleconferences from other organizations to discuss TAP. Morizio also asked members to take a look at Tap Space outreach presentations to assist them with talking points and other outreach aids.

Public Participation

None.

Action Item

Analyst Jenkins will draft an email for Morizio to invite SME, William Shupe to discuss "Systemic Reminder for Collection Hold" at the next teleconference on July 20th.

Closing

Cain thanked everyone for joining the teleconference call.

Next meeting:

Wednesday, July 20, 2011 @ 2:30pm EST.

**Area 2 Issue Committee
Wednesday, May 18, 2011
Teleconference
2:30 pm – 3:30 pm**

Designated Federal Official

- Juncewicz, Tina, Supervisory Taxpayer Advocate
- Juarez, Victor, Supervisory Taxpayer Advocate

Committee Members Present

- Boyle, Raymond
- Feng, Andrew
- Matthews, Theresa
- Miller, Ernest
- Silva, Michael
- Thomas, Donald, Area Vice Chair
- Webster, Walter

Committee Members Absent

- Acero, Antonio
- Bekolo, Paulette
- Cain, David, Area Chair
- Flanders, Seth
- Johnson, Francis
- Lees, John
- Sharpe, Connie
- Webber, Erica

TAP Staff

- Babb, Rose A., Management Assistant
- Jenkins, Audrey, Program Analyst

Welcome/Announcements

Thomas welcomed everyone to the call. Quorum was not met.

DFO Report

Juncewicz reported that TAS has seen an increase from taxpayers that have filed for the First time Homebuyers Credit repayment. In 2010, the IRS established an ID Theft Unit with Taxpayer Advocate Service. The ID theft has become a huge problem; TAS has seen an increase of 50% in 2010. Victor Juarez stated that his office is working to fix some issues that have affected the taxpayers First Time Home Buyers Credit refunds from being processed in a timely manner.

Subcommittee Report Out

Team A

Thomas reported for Flanders, he stated that since there was no subcommittee meeting this month, due to the refocus of TAP, the subcommittee does not have anything in their inventory and nothing new is being assigned.

Team B

Boyle reported on that his subcommittee did not meet this month, due to the refocus of TAP, the subcommittee does not have anything in their inventory and nothing new is being assigned.

Team C

Miller reported on the following Issues:

- 19234 Truck Expenses Disallowed – is being written up by Sharpe

19605 ID Theft – has been completed and will be sent out via email for approval in order to make it to the June JC agenda.

IRS Responses

Issue# 16726 – Telephone Numbers on Information Forms. Thomas stated that this issue has been forwarded to Chief Counsel's Office. A final decision on this issue is expected by June 8.

TAP Outreach/Best Practice

Thomas shared a cost efficient manner he has been doing outreach. He stated that he has been contacting CPAs and Enrolled Agents in his home state Virginia via phone to discuss TAP. He also stated that instead of travelling to different sites because of the increasing cost of gas he has sat in on some teleconference calls without physically attending the event.

Other

Jenkins informed the members that the TAP managers and direct reports were in Washington, DC last week ranking TAP applicant packages. Interviews will be conducted in the month of June. She asked members if they are interested in assisting with those interviews, they can submit their names for Area 1 and 2 to Odom in the Brooklyn TAP Office.

Jenkins will also send an email to the full committee to review issues 19234 and 19605 for review before sending to the JC Quality Review team.

Public Participation

None

Meeting Close

Thomas thanked everyone for joining the call.



Next meeting

Wednesday, June 15, 2011 @ 2:30pm EST.

**Area 2 Issue Committee
Wednesday, April 20, 2011
Teleconference
2:30 pm – 3:30 pm**

Designated Federal Official

- Lombardo, Lois, LTA Philadelphia, PA

Committee Members Present

- Boyle, Raymond
- Cain, David, **Chair**
- Feng, Andrew
- Flanders, Seth
- Johnson, Francis
- Lees, John
- Matthews, Theresa
- Miller, Ernest
- Silva, Michael
- Thomas, Donald, **Vice Chair**
- Webber, Erica
- Webster, Walter

Committee Members Absent

- Acero, Antonio
- Bekolo, Paulette
- Sharpe, Connie

TAP Staff

- Babb, Rose A., Management Assistant
- Berkey, Steve, Senior Analyst
- Jenkins, Audrey, Analyst
- Odom, Meredith, Analyst

Other Attendees

- Walker, Thomas, TAP National Chair

Welcome/Announcements

Cain welcomed every one to the teleconference call.

DFO Report

Lombardo stated that the IRS has implemented new procedures for reviewing taxpayers withholdings recorded on their tax returns. This procedure was previously handled by the Criminal Investigation Division.

Subcommittee Report Out

Team A

Flanders reported on the following issues:

- 19242 Correspondence Audits for Extension of Documents- Since there will be a review on Form 1040, this issue is dropped.
- 19825 Unable to obtain form W-2- is still being worked on.
- 19830 Required Minimum Distribution and Form 8606- has been placed in the parking lot.

Team B

Boyle reported on the following issues:

- 19233 E Services – is being worked on by the subcommittee.
- 19236 Tax Returns filed with Form W-7- has been dropped.
- 19240 EITC Disallowances- has been dropped.
- 19683 Foreign addresses not eligible for free file- has been dropped.
- 19685 Accept downloaded W-2 Forms – has been dropped.
- 19687 Advocate for taxpayers abroad – is being worked on.
- 20073 E-filing Form 8283 - is being worked on.

Team C

Miller reported on the following Issues:

- 19179 TAP Application Process- has been dropped.
- 19228 On line Subchapter S Elections – has been dropped.
- 19234 Truck Expenses Disallowed – is being worked on.
- 19605 ID Theft – is being worked on
- 2039 1040A Instructions – has been placed in the parking lot.

Issues Approval

Issue 19155 Notice 1400 (Alternate to paper filing postcard readability) – The full committee approved this issue with a few edits to be done before sending to the Joint Committee.

Issue 17854 –Improving elections confirmations for small business- The full committee approved this issue with a few edits to be done before sending to the Joint Committee.

TAP Outreach/Best Practice

Cain stated that he attended a Tax Forum in Charleston, West Virginia; he addressed more than 20 professionals.

Lees stated that he met with TAS and attended a small business meeting.

Other

Berkey stated that the recruitment period for TAP volunteer positions ends April 29th. He asked members to continue to encourage friends and anyone they think can be good candidates for the program to apply.

Refocus of TAP

Tap Chair, Walker joined the teleconference and briefly discussed the Refocusing of the TAP program. He mentioned the following items which were identified in his letter to all TAP members on March 25th:

- The screening process for Area committees will not change.
- Area committees will be asked to focus more on outreach activities. The goal of the Area committees will be to identify as many issues as possible from multiple sources.
- Non workable issues in Area committees will be identified and dropped; all other issues will go into the parking lot.
- Similar parking lot issues will be placed into predefined buckets.

Public Participation

None

Action Item

Issue 17154 Systemic Reminder for Collection hold. Jenkins will contact a subject matter expert to address members at the next teleconference this issue.

Next meeting: Wednesday, May 18, 2011 @ 2:30pm EST.

**Area 2 Issue Committee
Wednesday, March 16, 2011
Teleconference
2:30 pm – 3:30 pm**

Designated Federal Official

- Juncewicz, Tina, LTA North Carolina

Committee Members Present

- Acero, Antonio
- Bekolo, Paulette
- Boyle, Raymond
- Cain, David
- Flanders, Seth
- Johnson, Francis
- Lees, John
- Matthews, Theresa
- Miller, Ernest
- Silva, Michael
- Webster, Walter

Committee Members Absent

- Feng, Andrew
- Sharpe, Connie
- Thomas, Donald
- Webber, Erica

TAP Staff

- Babb, Rose A.
- Jenkins, Audrey
- Odom, Meredith
- Morizio, Louis

Other Staff

- Garvin, Wayne- LTA Wilmington, DE

Public Participation

- Tscherny, Elena, Alternate member, Washington
- McCrumb, Barbara, Alternate member, Delaware

Welcome/Announcements

Cain welcomed every one to the teleconference.

DFO Report

Juncewicz stated that there is a new IRS 2010 Data Book available on the IRS.gov website listed under news room. She mentioned that the data book has lots of information on tax returns and resources to assist members in doing their research.

Office Report (IRS Responses)

Jenkins asked the members to provide their rebuttal or acceptance for the two recommendations under Issue # 17154 - Systemic Reminder for Collection Hold. Since the member working this issue was absent, the committee has deferred this discussion for the next full committee call on April 20th.

Subcommittee Report Out

Team A

Flanders reported on the following issues:

- 19825- Unable to obtain Form W-2 Wage and Tax Statement – Analyst Jenkins is working with Thomas to combine this issue with Issue # 16726 Telephone numbers on information forms.
- 19830- Required minimum distribution on Form 8606- Non deductible IRAs - Flanders research this issue.
- 19235- Return extension for partnership – Dropped.
- 17854 – Easier method to obtain election confirmations – Lees and Thomas have done the final edits and have sent the issue on to the Quality Review Team.
- 19242 –Publication 1040 for 2009 – this issue is being worked by Thomas.
- 18803 SEPP72 –T Account – this issue will remain in the parking lot until Potenzzone gathers some additional Information.

Team B

Boyle reported on the following issues:

- 19240- EITC Disallowance – some more research needs to be done.
- 19233 – Eservices currently being worked.
- 19239- Tax Returns filed with Form W-7 Application for IRS identification number – Silva has made contact with the original taxpayer, this issue will be worked on pending some more research.
- 19404- Connect FOIA to Eservices- Dropped.

- 19155 Notice #1400 - this issue has been sent to the Quality Review Team.
- 19683 –Foreign address not eligible for free file -will be assigned.
- 19685 – Downloaded W-2 Forms Wage and Tax statements -will be assigned.
- 19687- Advocacy for taxpayers abroad- will be assigned.

Team C

Miller reported on the following issues:

- 19179 - TAP Applications will be written up for the next teleconference.
- 19228- Online Subchapter S Election - is being worked and will have a report for the next full committee call.
- 19177 –LTA offices need more staffing- Dropped.
- 19234- Trucker expenses disallowed - some additional information was requested from TAP Staff. A report will be given at the next full committee call.
- 19838 – FIT Withholding tables- Dropped.
- 19605- ID Theft -will be assigned.
- 20164 - Pension withholding increase -Dropped.

Issue # 16726 Telephone numbers on information forms

Rebuttal

The committee approved the issue going forward to the Joint Committee with some minor edits suggested by Cain and Johnson.

Outreach/Best Practice

Cain stated that he has an advertisement in his weekly local paper that reaches 5,000 readers weekly where he mentioned the TAP.

Silva mentioned that he will be doing some outreach but, does not have any business cards. Morizio mentioned that there was a problem with the business card vendor and that it has been resolved. Morizio stated to Silva that TAP has some blank business cards for use by members and that Odom will send a supply to whomever requests them.

Outreach Expectations

Morizio stated that last month there were 3 outreaches reaching approximately 200 taxpayers. He reiterated that doing outreach is an important part of TAP's Mission Statement. Morizio stressed to TAP members they need to go to events and get the word out. There needs to be greater emphasis on finding and attending events and bringing back grassroots issues. Morizio gave examples of possible outreach sources:

- Low Income Tax Clinic – the Publication 4192, List of LITCs, was sent to members and should be used to identify possible outreach resources.
- Local Taxpayer Advocates (LTAs) – members should contact their LTAs for outreach events.
- Media – newspapers, TV and radio stations, and local publications.

Public Participation

Tscherny mentioned that she wants to participate in outreach events in the Washington, DC area; she will coordinate with Johnson.

Action Item

Odom will send a supply of blank business cards to Silva.

Closing:

Cain thanked everyone for joining the teleconference.

Next meeting:

Wednesday, April 20, 2011 @ 2:30pm EST.

**Area 2 Issue Committee
Wednesday, February 16, 2011
Teleconference
2:30 – 3:30pm**

Designated Federal Official

- Juncewicz, Tina, North Carolina Local Taxpayer Advocate

Committee Members Present

- Acero, Antonio
- Bekolo, Paulette
- Boyle, Raymond
- Cain, David, Chair
- Feng, Andrew
- Flanders, Seth
- Johnson, Frances
- Lees, John
- Matthews, Theresa
- Miller, Ernest
- Sharpe, Connie
- Silva, Michael
- Thomas, Donald, Vice Chair
- Webber, Erica
- Webster, Walter

TAP Alternate members

- McCrumb, Barbara - Delaware
- Patton, Susan - Pennsylvania
- Tscherny, Elena – District of Columbia

TAP Staff

- Babb, Rose A., Management Assistant
- Jenkins, Audrey Y., Program Analyst
- Morizio, Louis, Program Manager
- Odom, Meredith, Program Analyst

Other Attendees

- Devoe, Melody, Wage & Investment Tax Law Specialist
- Freeman, Curtis, Wage & Investment Tax Law Specialist
- Hynes, Doris, Audit Manager, Treasury Inspector General of Tax Administration (TIGTA)

Welcome/Announcements

Cain welcomed everyone to the teleconference call.

DFO Report

Juncewicz welcomed everyone. She mentioned to members that as TAP members, they cannot make legislative decisions, but as private citizens, they can provide Tax Reform ideas. She provided the website address for members to submit their ideas to the National Taxpayer Advocate, Nina Olson. That website address is: www.taxpayeradvocate.irs.gov

Office Report

Jenkins announced the names of the alternates and members of the public and opened up a discussion on IRS Responses to Issues 16721 – Request to Speak to a specific IRS employee and 16726 – Telephone Numbers on Information Forms.

IRS response to Issue 16721, Johnson stated that the IRS responder did not get the point of the referral. She stated that the referral was to help the taxpayer understand why they could not get back to the same assistor they had spoken to previously. Johnson also stated that TAP did not ask for changes to the IRM.

Johnson also mentioned that the recommendation was assigned to two different responders; the first responder implemented the solution for the website on 6/17/2010. Jenkins mentioned that she will contact the responder and make a request to join the next teleconference call to address further questions Johnson may have.

IRS response to Issue 16726, Thomas stated that W2 Forms should have contact information for taxpayers who may need to request corrected copies. He stated that Form 1099 contain phone numbers.

Melody Devoe mentioned that the problem is W2 forms are also prepared by third party preparers and it would be unclear to whom the taxpayer should contact. Curt Freeman stated that he had not seen the response and that his office will discuss this issue with Chief Counsel. Jenkins stated that TAP will wait for counsel's response.

Morizio informed the members that TAP Space still does not have any documents. There is an issue with TAP Space regarding using the latest version of Internet Explorer 8. The staff has to be upgraded to Internet Explorer 8, and this will take several weeks. Until further notice, the minutes and agendas will be sent to members via email.

Subcommittee Report out:

Subcommittee A – Seth Flanders - Lead

- Issue #17851 - Easier method to obtain a CAF number – dropped.
- Issue #17854 - Easier process to obtain an election confirmation will be written up for review by the full committee.
- Issue #18803 –SEPP 72- T Accounts, is still open and being worked.
- Issue #19232- Distributions from 529 Plan was dropped.

- Issue 19235 –Partnership Returns Extensions, Webber is waiting on some additional research.

Subcommittee B – Ray Boyle – Lead

- 19240 –EITC Disallowance, some more research is needed.
- 19233 –e Services, this issue is pending some additional information.
- 18946 –Erroneous contributions to IRA – dropped.
- 19236-Tax Returns filed with Form W7 (Application for IRS Individual Taxpayer Identification Number) Boyle stated that his subcommittee will be doing some more research.
- 19404 -FOIA (Connect to e-services so that Circular 230 participants can download the FOIA file). Boyle stated that Tap Staff and Silva have attempted to make follow-up on this issue. The subcommittee has decided to hold on to this issue for one more month pending some additional research.
- 19155 –Notice #1400 return processing, is in draft form.
- 17259 -Include additional text boxes to the Form 1040 on line version, allowing computer input and therefore required information completion when printed out. The full committee agrees to approve with edits and subsequently forward to the Joint Committee.

Subcommittee C Ernest Miller

Lead will provide Jenkins with an official report via email.

Outreach - Best Practice

Cain stated that he has had quite a few people in his office and has discussed TAP within the last three weeks.

Lees stated that he has scheduled meetings with his local TAS representative. This meeting is scheduled for next Wednesday. He mentioned that he will be touring TAS offices and will also be strategizing how to participate in outreach activities with the Local Taxpayer Advocate.

Thomas contacted a TAS representative in Virginia. He will be doing some outreach at TAS sponsored events in March.

Morizio stated to members that if their local taxpayer advocate cannot do any outreaches because of budget restrictions, they should contact the LITC in their local areas for outreach events. Morizio will forward a list of LITCs.

Public Participation

Doris Hinds from TIGTA stated that having issues referred to by number without giving a short title was difficult to follow if one was not familiar with the topic.

Alternates McCrumb and Tscherny agreed with Hinds.

Action Item:

Morizio will send out Publication 4134 – a list of Local Income Tax Clinic, (LITC) in each state will be sent to panel members via email.

Other

Odom reminded members to send in and review their outreach spreadsheets and to ensure that the dates and number of attendees are filled in.

Meeting Close Up

Cain thanked everyone for joining the call. Next meeting will be March 16, 2011 at 2:30 pm EST.



**Area 2 Issue Committee
Wednesday, January 19, 2011
Teleconference
2:30 pm – 3:30 pm**

Designated Federal Official

- Juncewicz, Tina

Committee Members Present

- Bekolo, Paulette
- Boyle, Raymond
- Cain, David
- Feng, Andrew
- Flanders, Seth
- Johnson, Francis
- Lees, John
- Matthews, Theresa
- Miller, Ernest
- Sharpe, Connie
- Thomas, Donald
- Webber, Erica
- Webster, Walter

Committee Members Absent

- Acero, Antonio
- Silva, Michael

TAP Staff

- Babb, Rose A.
- Jenkins, Audrey
- Odom, Meredith
- Morizio, Louis

Welcome/Announcements

Cain welcomed every one to the first teleconference call for the year.

DFO Report

Tina Juncewicz, the Designated Federal Official, (DFO) for Area 2, welcomed all. She informed the members that the National Taxpayer Advocate, (NTA) Nina Olson has issued her Report to Congress. This report is available at the Taxpayer's Advocate website for members to view and read. Juncewicz stated the most significant issue in the Report to Congress, is the complexity of tax laws.

Office Report

Jenkins mentioned the 4 responses from the IRS that were attached to the agenda for the meeting. She asked the members if the responses from the IRS were acceptable to them or, if they wish to send a counter response. The members stated that the responses were acceptable, except for one noted by Thomas, Issue #16726 Adding Telephone Numbers on W2 Forms. Morizio stated that legislation may not be necessary to add telephone numbers on W2 Forms. This may be done by notice or regulations business unit. Jenkins stated that she will get in touch with the person listed on the issue response to address the members questions on the next teleconference call.

Other

Johnson inquired about Issue 16636 -Extend Tax Annual Mailing, was an issue started by former TAP member Bob MQuiston and current TAP member Potenzzone. Johnson completed this issue and it was sent to Potenzzone who was Chair of Area 2 during that time. Potenzzone reworked the issue and sent it to the Joint Committee.

Issue 16721-Request to speak to an IRS Employee, was sent up to the Joint Committee, who elevated it to the IRS. The solution was comprised of two parts, one for wording on the IRS website and one for telephone assisters. The IRS implemented the change and put the wording on their website in June of 2010. Johnson stated her concerns that the IRS did not implement the part concerning the telephone assisters because more taxpayers call in than use the website.

Jenkins and Morizio will follow up on the status of these two issues.

Subcommittee Report Out

Team A

Flanders reported on the following issues:

- 19214- Request to complete returns for taxpayers and send the changes to the taxpayers – Dropped
- 19235- Return extension for partnership – some more research needs to be done by the subcommittee.
- 17851- Easier method to obtain CAF- Dropped
- 17854 – Easier method to obtain election confirmations – Thomas will continue with some more research.



- 19229 Schedule D Omissions- Dropped
- 19242 Correspondence Audits for Extension of Documents – This issue has been put into the parking lot pending feed back.
- 19239 IRS should handle proof of birth by implementing the same procedures used by Social Security Administration, (SSA). This issue has been dropped.
- 18803 SEPP72 –T Account – this issue will be researched further by the subcommittee
- 19232 Distribution from 529 Plan- Dropped

Team B

Boyle reported on the following issues:

- 19240 EITC Disallowances is being worked on by the subcommittee
- 19233 e Services – is being worked on by the subcommittee
- 18946 Erroneous IRA Contributions is being worked on by the subcommittee.
- 17259 – 1040 Fillable forms are ready to be written up.
- 19155 Notice # 1400 are ready to be written up.
- 18399 CP2000- Dropped
- 19236 Tax Returns filed with Form W-7- have been placed in the parking lot.
- 19404 Connect FOIA to eServices – have been place in the parking lot.

Team C

Miller reported on the following Issues:

- 19179 TAP Application processes- will be written up and sent to TAP Office.
- 19228 On line Subchapter S Elections is being researched by the subcommittee.



- 17858 E post cards for exempt are being researched by the subcommittee.
- 19234 Truck expenses disallowed – this issue is being researched by Sharpe.
- 17932 Back year returns for non-filers- has been corrected and is scheduled for the Joint Committee meeting in January.

Outreach/Best Practice

Cain stated that he attended an outreach event in West Virginia, at West Virginia Public Accountants Association and Society for Public Accountants. He stated that this event was attended by more than 100 people. He mentioned his PowerPoint Presentation and told the members he would like to share it with them for their comments.

Sharpe attended an outreach event with Taxpayer Assistance Center. She also mentioned she received some good responses from the AARP assistance center.

Morzio asked members to please respond to Odom with their outreach activities no later than the 5th day after the end of each month. Members are asked to please use the format sent to them by Odom to submit outreach activities.

Morzio reiterated that new members must remember to check with their mentors. The mentors can assist with outreach activities and any other questions that they may have.

Morzio also stated that TAP is looking for venues for EITC Awareness day. A spread sheet will be sent to all members with some venues. Members should get back to Odom and let her know if they are interested in attending those events.

Action Item

Jenkins will contact Analyst Patty Robb to provide members with an electronic copy of the letter to send to their senators.

Next meeting: Wednesday, February 16, 2011 @ 2:30pm EST.